Click&DECiDE
Business Application Intelligence

Administration Manager
&
Web Menu Manual

New Click&DECiDE Version 2013

Last Edition August 12th, 2013

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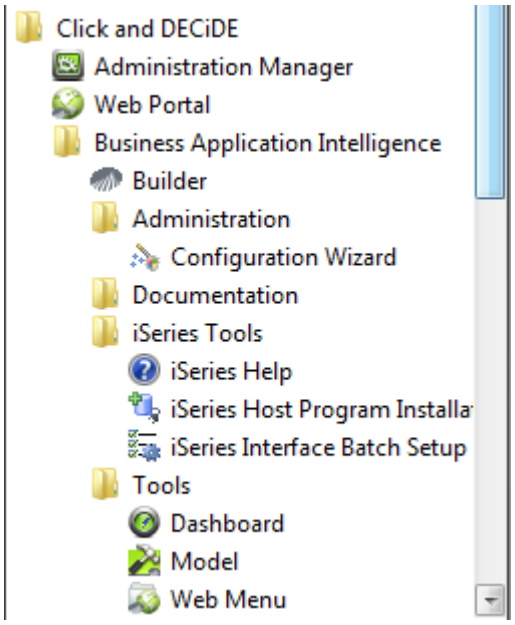
1. Starting with Click&DECiDE Administration Manager

1.1. Using the Click&DECiDE Start Menu

The Click&DECiDE Start menu displays the following modules. To display the Start menu click **Start> All Programs> Click and DECiDE**.



Administration Manager: click **Administration Manager** to launch the Administration Manager. The Administration Manager enables you to define and setup each data source you want to access. In the Professional and Enterprise Edition, the Administration Manager also enables you to define the Security when accessing data sources: User Groups, Users, Menus used in the Web Portal and the Authentication mode.

In the Express and Standard Edition, this command only allows to define and setup each data source you want to access.

Web Portal: click **Web Portal** to access your Click&DECiDE Web Portal. The Web Portal will be launched.

1.1.1. Using the Start Menu's Business Application Intelligence Folder

Builder: click **Builder** to launch the Click&DECiDE Builder. The Builder is the main program which enables you to start the application to create queries, reports and cubes, all saved in the same project with a ".wfv" extension.

Configuration Wizard: click **Configuration Wizard** to launch the Click&DECiDE Configuration Wizard again. You may choose to run the Configuration Wizard again in the following cases:

- If you need to change your license certificate.
- If you need to change the Web Portal Authentication mode.
- If you need to change your Mail Server name.
- If you need to change the SQL Server Authentication mode.

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1.1.2. Using the Start Menu's Tools Folder

Dashboard: click **Dashboard** to launch the Click and DECiDE Dashboard program. This program enables you to easily create user-friendly end-user dashboards using Click&DECiDE queries, reports, graphs and cubes without any previous programming experience.

Model: click **Model** to launch the Click&DECiDE Model program (Enterprise Edition only). This program allows the Administrator to create end-user table views, with hidden fields, pre-defined joins, pre-prepared calculated fields and hidden criteria. Tables and columns can be renamed to make the names more user-friendly to the end user. A Click and DECiDE Model data source must be then created in the Administration Manager in order to make queries for a Model.

Web Menu: click **Web Menu** to launch the Click and DECiDE Web Menu program (Enterprise Edition only). This program allows the Administrator to create the Menus they want to publish via the Web Portal, according the User Groups defined in the Administration Manager.

1.1.3. Using the Start Menu's iSeries Tools Folder:

iSeries Help: click **iSeries Help** to open the Click and DECiDE iSeries Online Help.

iSeries Host Program Installation: click **iSeries Host Program Installation** to run the tools required to upload to the AS/400 Host Program.

iSeries Interface Batch Setup: click **iSeries Interface Batch Setup** to run the tools managing the rights for the Batch Facility. This is a specific feature for iSeries that must be prepared by the AS/400 Administrator.

1.1.4. Using the Start Menu's Documentation Folder

Products and Solution Data Sheets: click **Products and Solution Data Sheets** to product and solution documents on the Click& DECiDE web site.

Readme: click **Readme** to open the Readme file and read about the new features in the current version.

Technical Documentation: click **Technical Documentation** to open technical documents on the Click&DECiDE web site.

1.2. Launching the Administration Manager (Professional or Enterprise Edition)

If you have installed the Professional or Enterprise Edition, then if you click Administration Manager in the Click and DECiDE Start menu, the Click and DECiDE Administration Manager module will be launched. Click and DECiDE Administration Manager allows you to perform the following tasks:

- Add and configure each data source you need to access
- Manage Users and User Groups
- Manage the Security for each data source that must be accessible according to the User Group
- Grant access to User Groups to predefined Web Menus.

To launch the Click&DECiDE Administration Manager click **Start> All Programs> Click and DECiDE> Administration Manager**.

Note: no login is required because, by default, the Windows Groups you belong to have been added to the Authorized Groups being able to run this program.

If the Server Computer does not belong to a Domain, the Setup procedure will treat the Local Groups. However, if the Server Computer belongs to a Domain, the Setup procedure will treat the Domain Groups.

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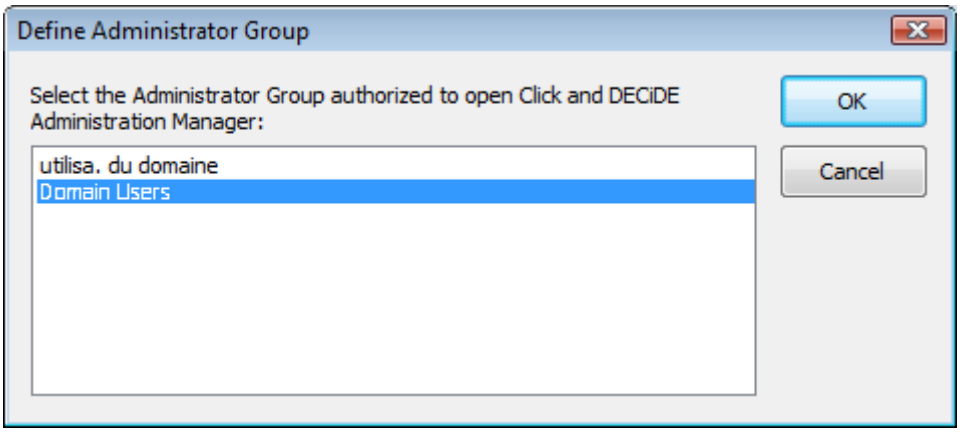
1.3. Checking or Modifying the Administrator Group

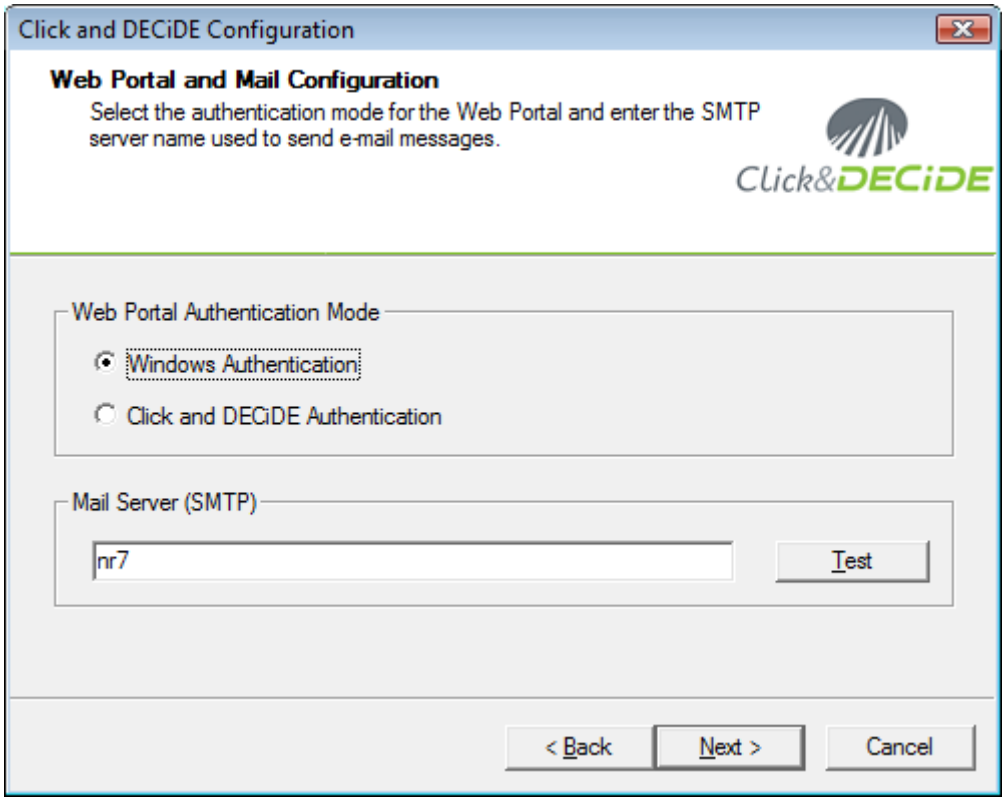
To check or modify the Group authorized to open this program, please follow the steps below.

1. Select **Tools> Set Administrator Group**. The **Define Administrator Group** dialog box appears.



2. Select the Administrator Group authorized to open this program, and if necessary, create another specific Windows Administrator Group if necessary.

   Important note: the above feature does not depend on the Web Portal Authentication Mode chosen when installing Click&DECiDE Professional or Enterprise Editions.


Click and DECiDE Configuration
Web Portal and Mail Configuration
Select the authentication mode for the Web Portal and enter the SMTP server name used to send e-mail messages.
Click&DECiDE
Web Portal Authentication Mode
Windows Authentication
Click and DECiDE Authentication
Mail Server (SMTP)
nr7
Test
< Back
Next >
Cancel

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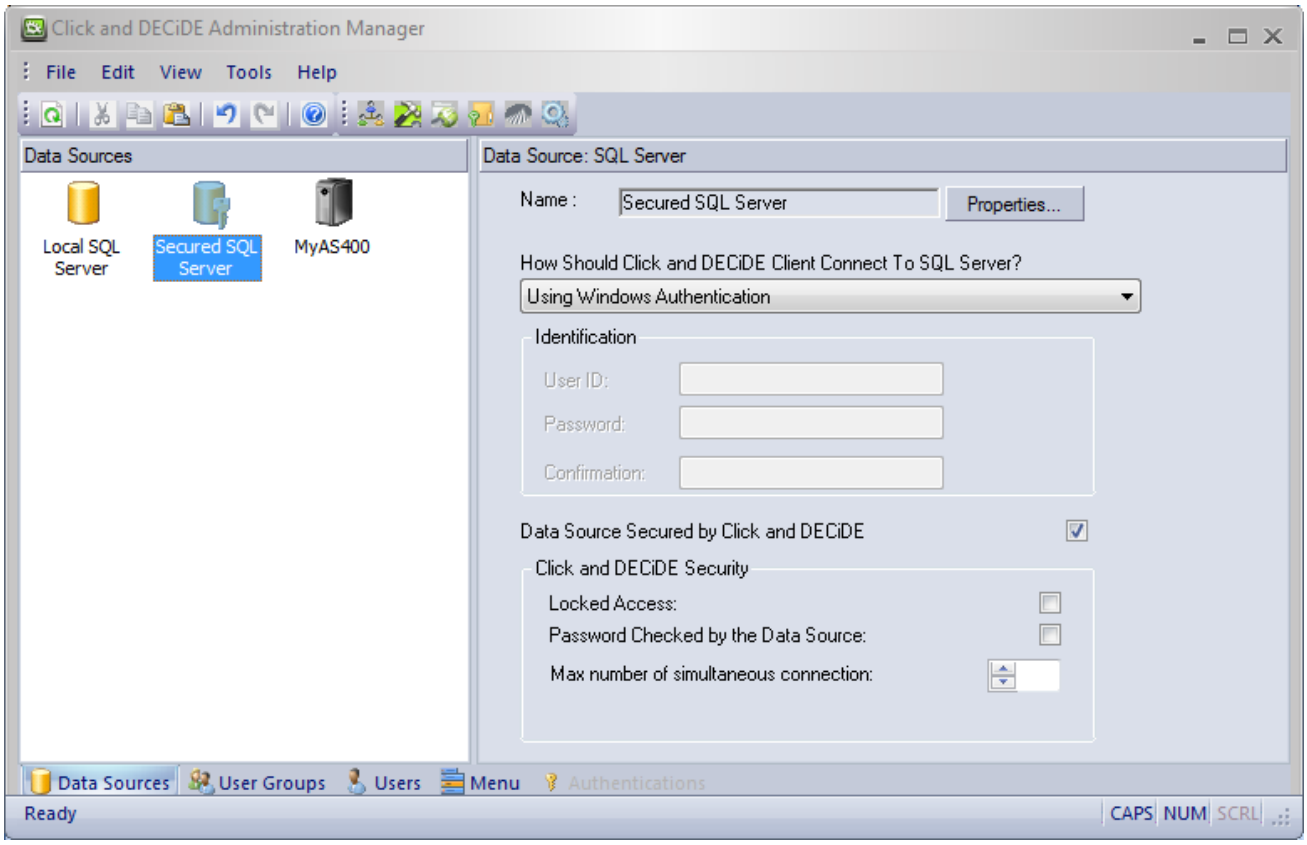
Note: you can select either Windows Authentication or Click and DECiDE Authentication for the Web Portal when installing the software, however, this choice has no relation to the way the Click and DECiDE Administration Manager opens.

2. Using the Data Sources Tab (Professional or Enterprise Editions)

You must start by defining the data source you want to access. The Administration Manager allows you to add and setup a new configuration for each data source you need to access, manage Users and User Groups, manage the Security for the data sources that must be accessible depending on the User Group and give access to User Groups to predefined Web Menus.



2.1. Modifying an Existing Data Source

To modify an existing data source, please follow the steps below.

1. Select the **Data Sources** tab.
2. Right-click the Data Source you want to modify. For example, the Data Source Local SQL Server.
3. Select **Properties** (or select **File>Properties**) to display the **Settings** dialog box.

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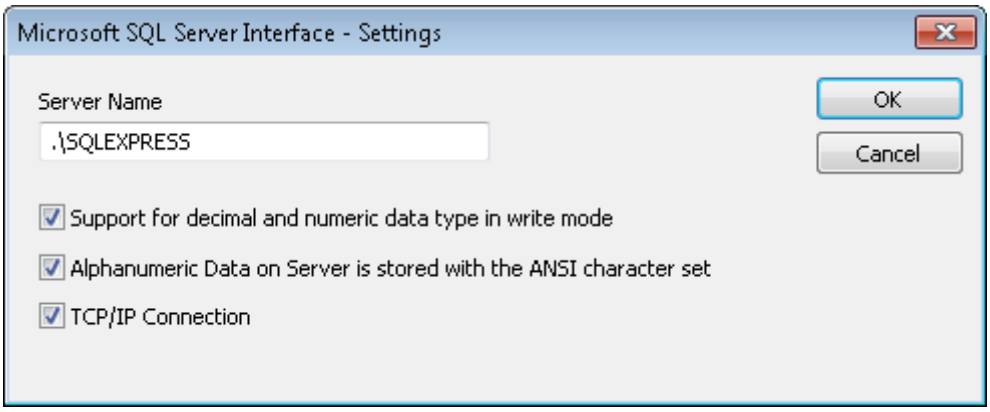
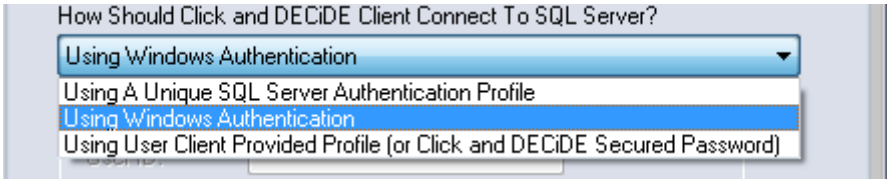
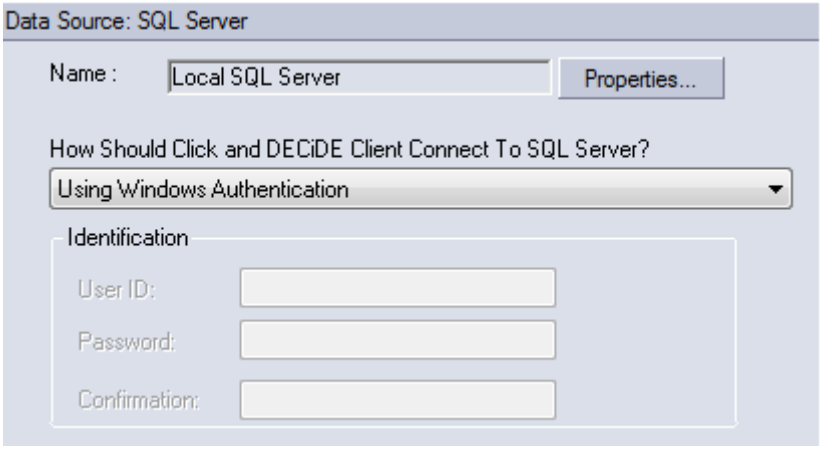

Microsoft SQL Server Interface - Settings
Server Name
.\SQLEXPRESS
OK
Cancel
Support for decimal and numeric data type in write mode
Alphanumeric Data on Server is stored with the ANSI character set
TCP/IP Connection

4. Specify the **Server Name** or **Server Name\Instance Name** for the SQL Server you want to access.
5. Select the appropriate check boxes.
6. Click **OK**.
7. Select the connection modes for an SQL data source (if appropriate) in the right pane.


How Should Click and DECiDE Client Connect To SQL Server?
Using Windows Authentication
Using A Unique SQL Server Authentication Profile
Using Windows Authentication
Using User Client Provided Profile (or Click and DECiDE Secured Password)

Windows Authentication: no Identification login is required.



Unique SQL Server Authentication Profile: this can be used if your SQL Server database security has been configured in Dual Mode and you wish to use an identified connection. Enter the User ID, Password and confirm the password. Note: the end user does not need to know the Database password, they only need to be identified.

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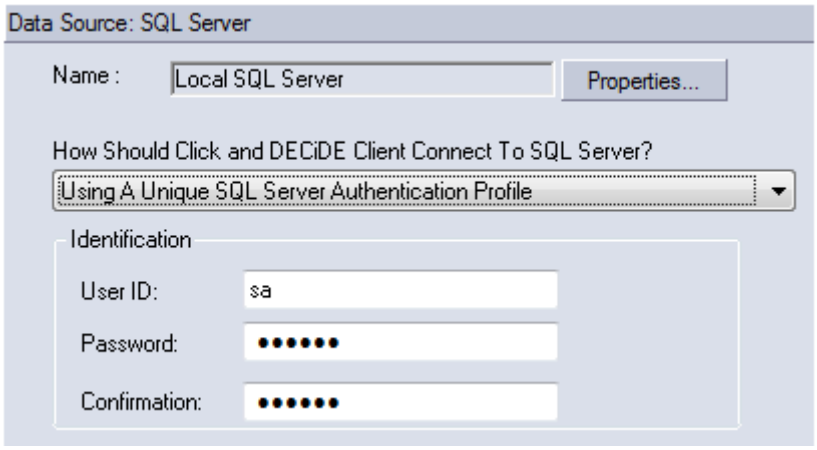
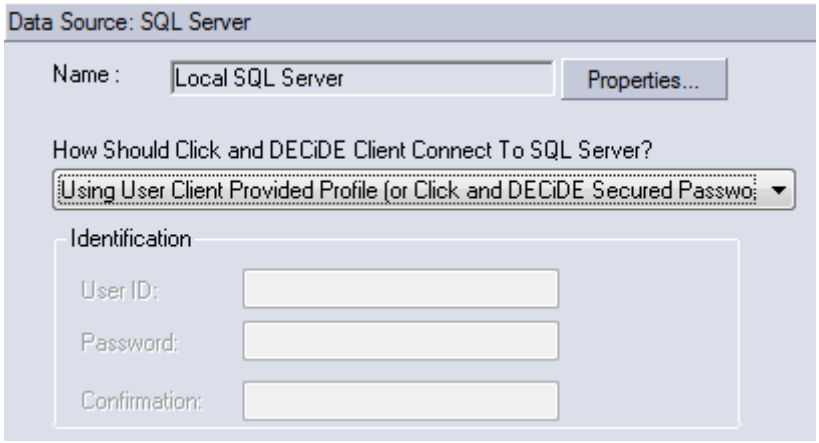
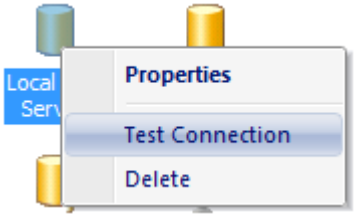


User Client Provided Profile (or a Click&DECiDE Secured Password): If you want the user to enter their personal SQL Server Client Login (or a Click&DECiDE Secured Password), then you must have selected **Click and DECiDE Authentication** when you ran the Configuration Wizard. In this case each user must be defined in the Administration Manager User Tab with a specific password. No Identification login is required now, but the user will be prompted to enter their client user login each time they connect to this data source later.



8. Right-click the data source.
9. Note the following options available in the context menu.



Test connection: the connection will use the defined mode and only ask you to login if the **Using User Client Provide Profile** option was selected.

Delete: removes this data source.

10. Press **F2** if you want to change the data source name.

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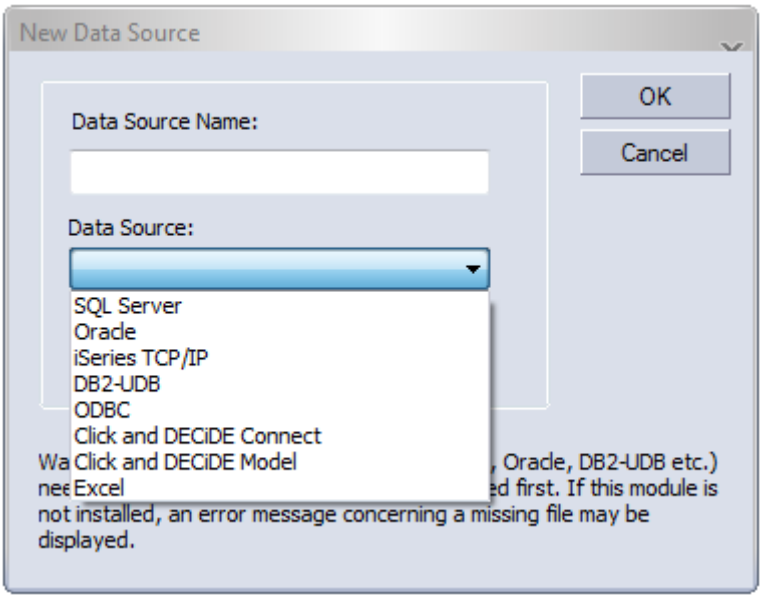
11. Click **File> Update Security** to update the Administration Manager configuration after each modification.

.

2.2. Creating a New Data Source

You can create a new data source in the **Data Sources** tab, to do so please follow the steps below.

1. Right-click in the central pane of the Administration Manager.
2. Click **New Data Source** or select **File> New> Data Source**. The **New Data Source** dialog box appears.



3. Note that each type of Data Source will display a specific dialog box where you can define the configuration.
4. Click each tab to configure the options according to the data source you want to use.
5. Note that for some Data Sources such as SQL Server, Oracle or UDB-DB2, you need the proprietary client module to be installed first. If not, an error message will appear as it is trying to connect to the missing client module.

2.2.1. Configuring an SQL Server Data Source

To configure an SQL Server Data Source, follow the steps below.

1. Right-click in the central pane of the Administration Manager.
2. Click **New Data Source** or select **File> New> Data Source**. The **New Data Source** dialog box appears.
3. Enter a Data Source Name, for example MySQLServer.
4. Select the **SQL Server** Data Source.

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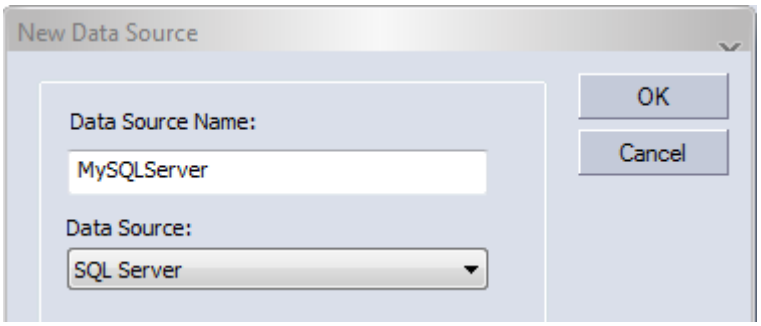
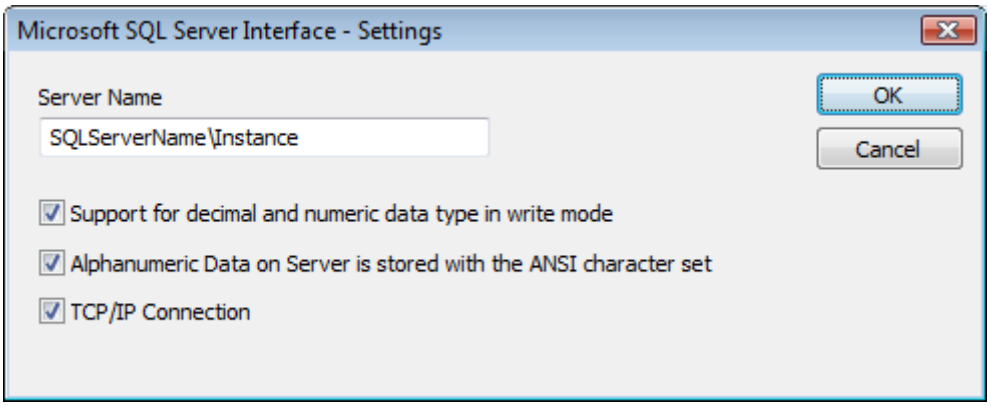


5. Click **OK**. The **Settings** dialog box appears.
6. Enter the **Server Name** and if appropriate the Instance Name. For SQL Server 2005 installed with the Click&DECiDE package, the Instance name is SQLExpress. (.\SQLExpress can be entered).


Microsoft SQL Server Interface - Settings
Server Name
SQLServerName\Instance
OK
Cancel
Support for decimal and numeric data type in write mode
Alphanumeric Data on Server is stored with the ANSI character set
TCP/IP Connection

7. Select the check boxes as appropriate.
8. Click **OK**.

2.2.2. Configuring an iSeries Data Source

To configure an iSeries Data Source, follow the steps below.

1. Right-click in the central pane of the Administration Manager.
2. Click **New Data Source** or select **File> New> Data Source**. The **New Data Source** dialog box appears.
3. Enter a **Data Source Name,** for example MyAS400 for a new iSeries Data Source.
4. Select the iSeries TCP/IP data source from the **Data Source** drop-down menu.

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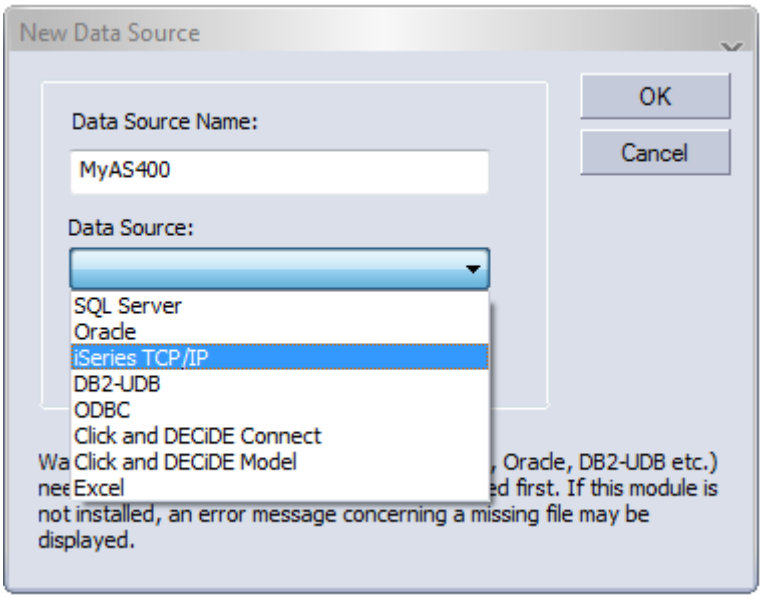
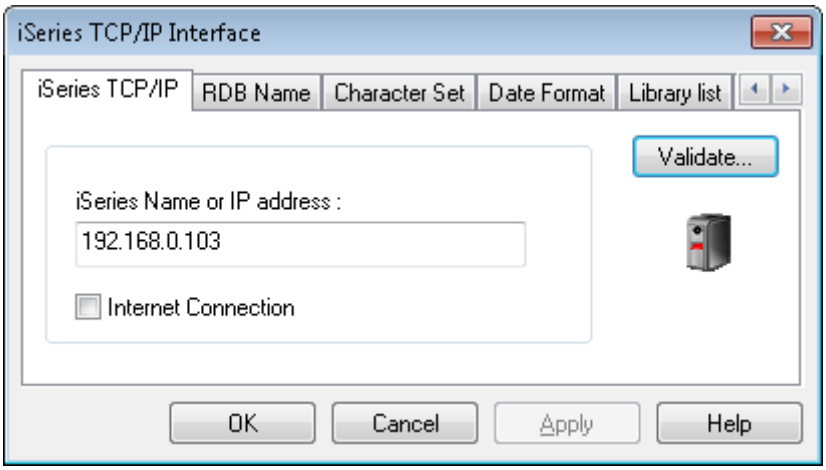


5. Click **OK**. The **iSeries TCP/IP Interface** property sheet appears.
6. Enter the **iSeries Name or IP address.**



7. Select the **RDB Name** tab.
8. Enter the **Relational Database Name (RDB Name)**.

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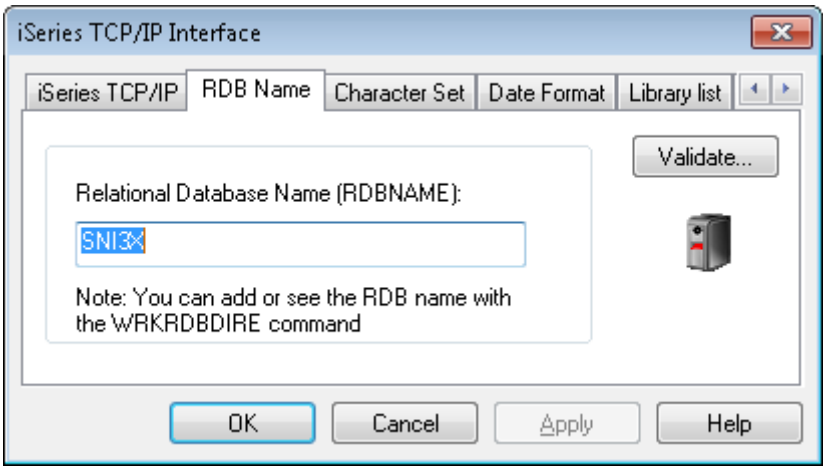
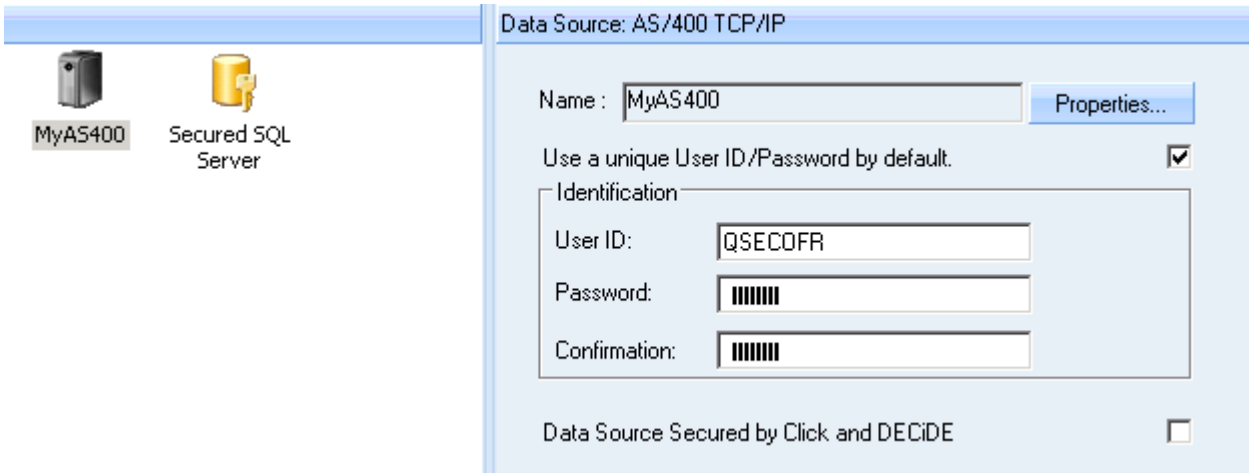


9. Click **Validate**. The connection will be tested.
10. Note that once the connection has been successfully tested, the new iSeries data source is ready to use.

Note: for this data source, the **Host Program Installation** should be run before creating this data source.



11. Right-click the MyAS400 icon in the central pane.
12. Click **Test Connection**. The default login will be used.
    Note: if this data source must be used later via the Web Portal, you must activate the **Data Source Secured by Click and DECiDE** option. End users will be then able to connect to this AS/400 Data Source without knowing the iSeries Login, but using their Windows Login (if Windows Authentication has been selected) or using a predefined login declared in the Click and DECiDE Administration Manager if Click and DECiDE Authentication has been selected).

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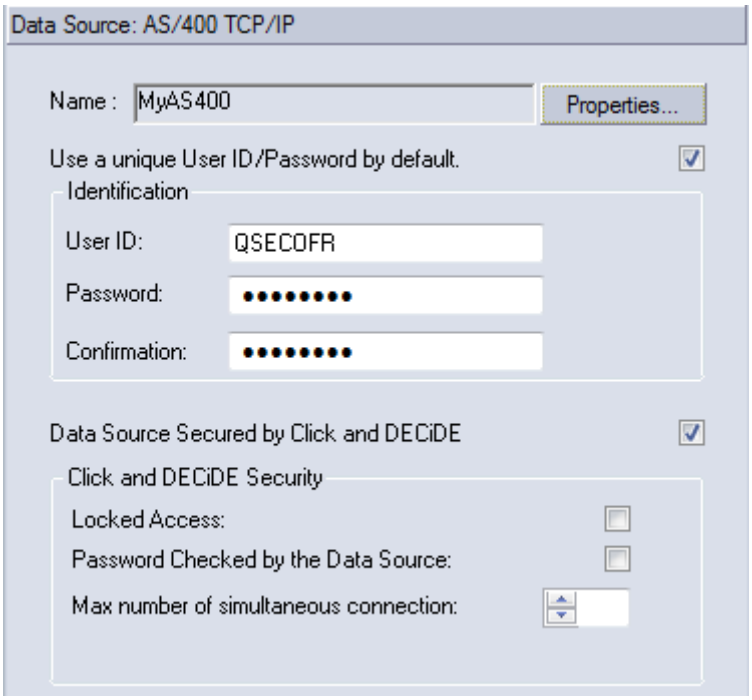
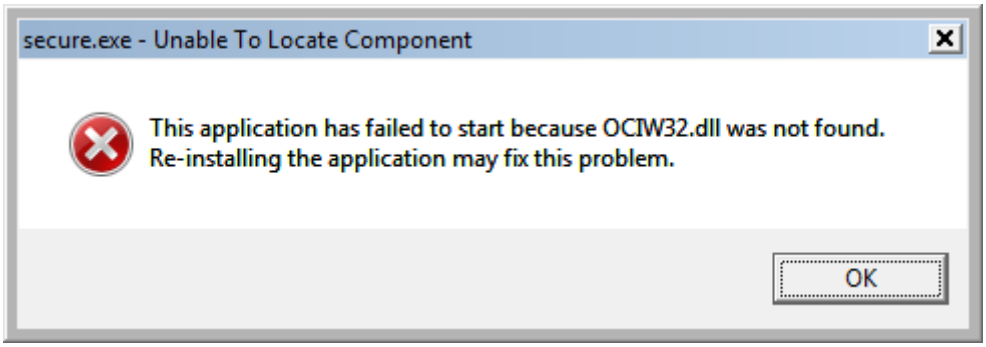
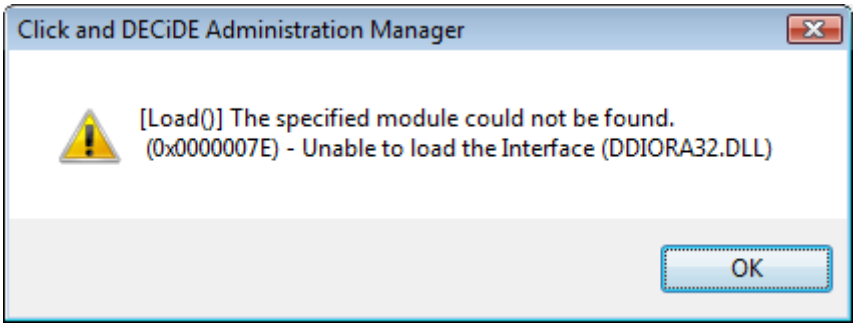


2.2.3. Configuring an Oracle Data Source

Important: for some Data Sources such as SQL Server, Oracle or UDB-DB2, the proprietary client module must be installed first. If not, an error message will appear informing you that it is trying to connect to the missing client module. For example, if you have not installed an Oracle client module, the following error message appears when you try to define an Oracle data source.


secure.exe - Unable To Locate Component
This application has failed to start because OCIW32.dll was not found.
Re-installing the application may fix this problem.
OK

Followed by the following error.


Click and DECiDE Administration Manager
[Load()] The specified module could not be found.
(0x0000007E) - Unable to load the Interface (DDIORA32.DLL)
OK

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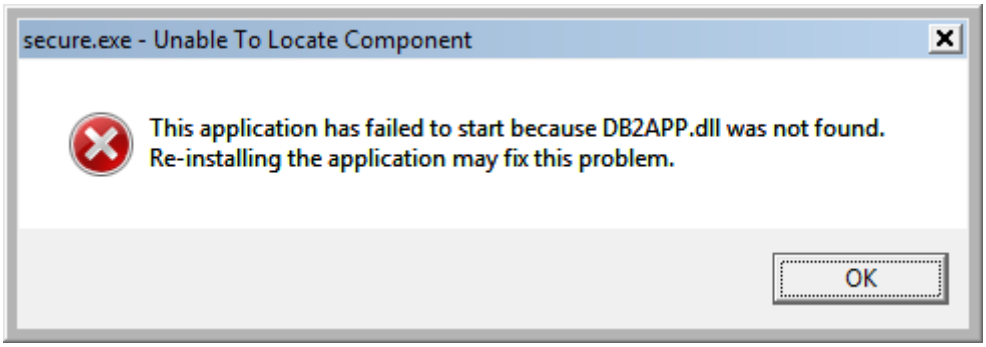
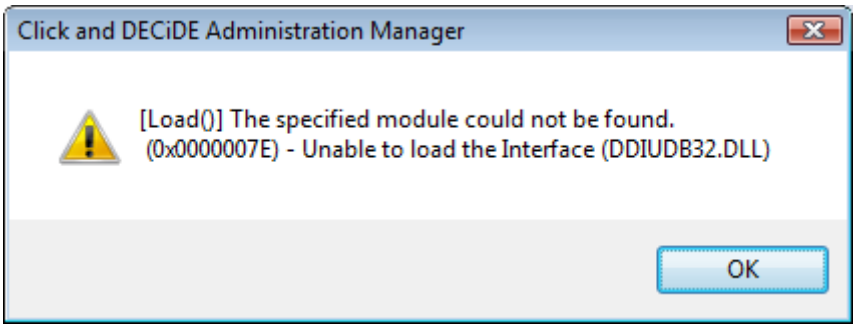
2.2.4. Configuring a UBD-DB2 Data Source

You must install a UDB-DB2 client module before adding a new UDB-DB2 data source via the Click&DECiDE Administration Manager. If you have not installed a UDB-DB2 client module, the following error message appears when you try to define a UDB-DB2 data source.


secure.exe - Unable To Locate Component
This application has failed to start because DB2APP.dll was not found.
Re-installing the application may fix this problem.
OK

Followed by the following error.


Click and DECiDE Administration Manager
[Load()] The specified module could not be found.
(0x0000007E) - Unable to load the Interface (DDIUDB32.DLL)
OK

2.2.5. Configuring an ODBC Data Source

To configure an ODBC Data Source, follow the steps below.

1. Right-click in the central pane of the Administration Manager.
2. Click **New Data Source** or select **File> New> Data Source**. The **ODBC Interface - Setup** dialog box appears.
3. Select an **ODBC Data Source**.

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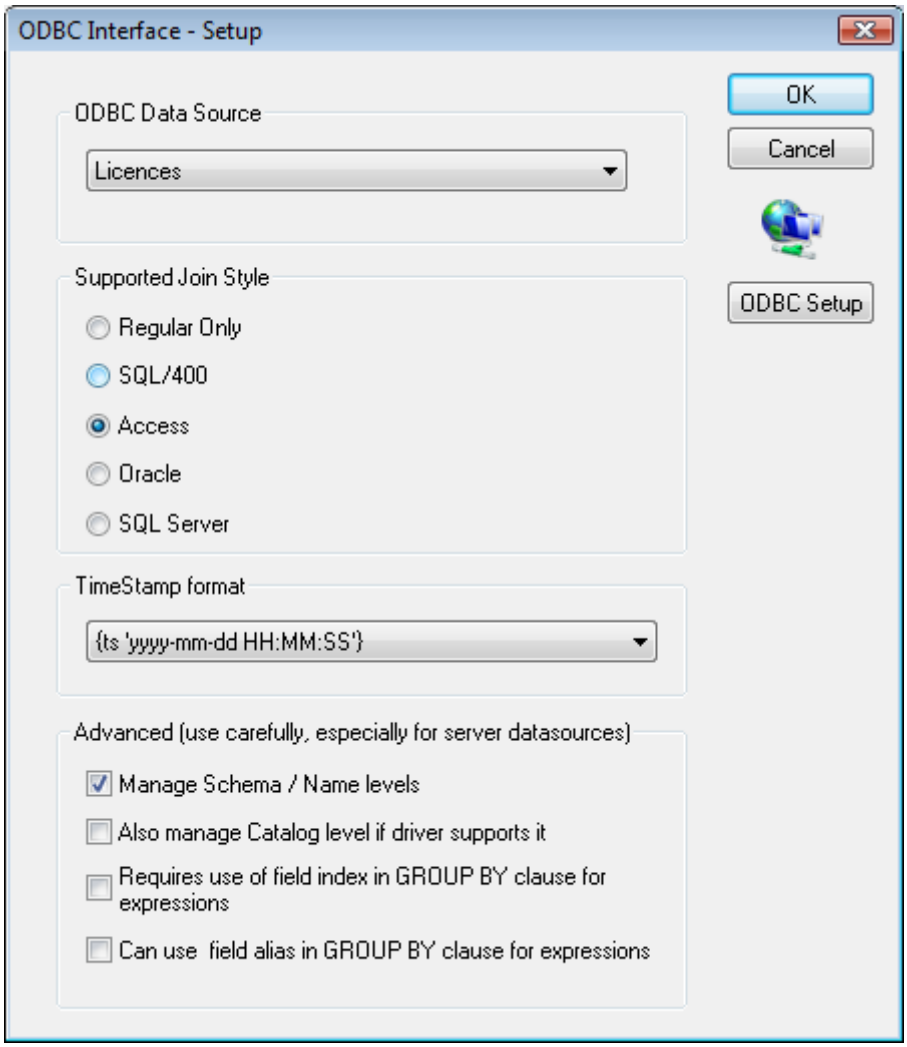

4. Click **ODBC Setup** to create or modify the ODBC Data Source Setup.

Recommended: the data source should be defined in the **System DSN** Tab, rather than the **User DSN** Tab, if you wish this data source to be able to be used not only locally on the Server but also from remote workstation through the Web Portal or using a Click&DECiDE Connect data Source.

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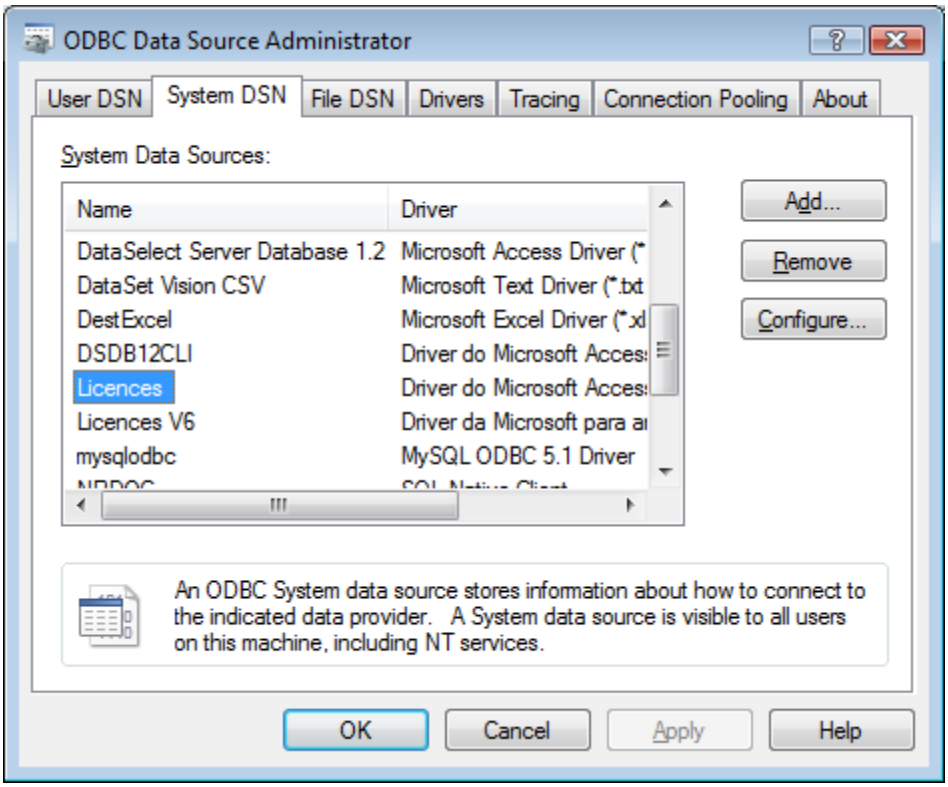
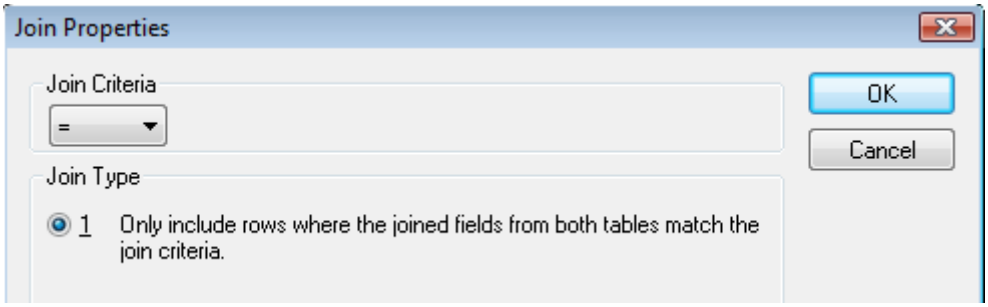


5. Click **Configure** to define the ODBC setup as appropriate, according to the database type.
6. Go back to the **ODBC Interface – Setup** dialog box.
7. Select the Join Style.

   Regular Only: will only support Join Type #1 corresponding to the first option in the Click&DECiDE Builder **Join Properties** dialog box.



SQL Server: will support all proposed Join Types in the Click&DECiDE Builder **Join Properties** dialog box:

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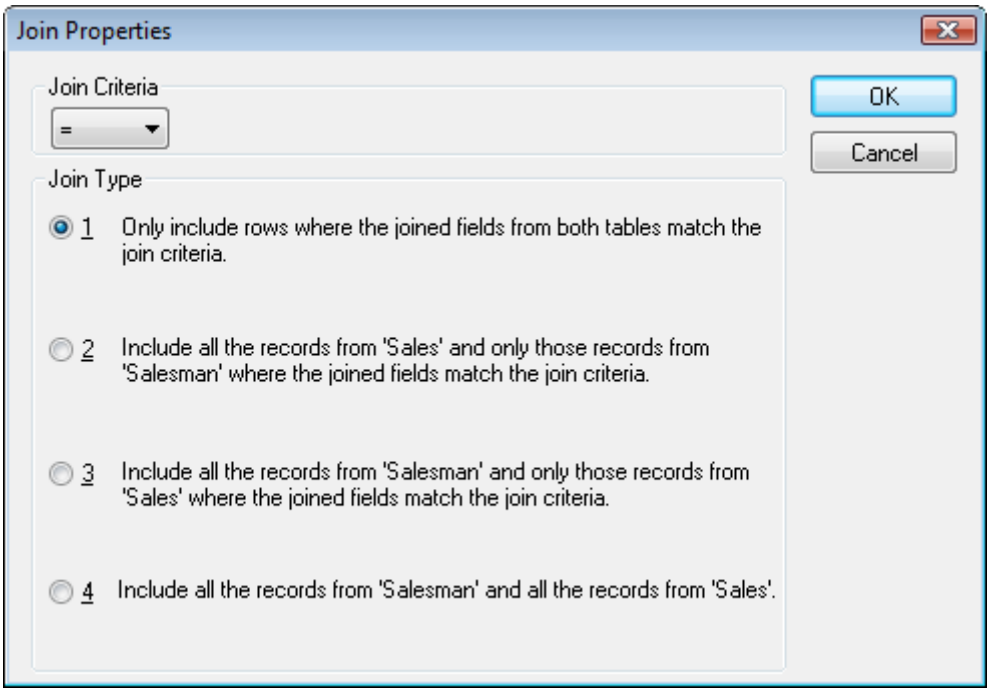
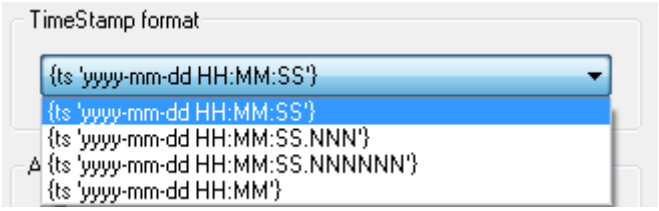

Join Properties
Join Criteria
=
OK
Cancel
Join Type
1 Only include rows where the joined fields from both tables match the join criteria.
2 Include all the records from 'Sales' and only those records from 'Salesman' where the joined fields match the join criteria.
3 Include all the records from 'Salesman' and only those records from 'Sales' where the joined fields match the join criteria.
4 Include all the records from 'Salesman' and all the records from 'Sales'.

8. Select the **Timestamp format**: that corresponds to your ODBC Database from the drop-down list.



9. Select the **Advanced** check boxes as appropriate. For example, the way to display table levels or to manage the GROUP BY statement.

2.2.6. Configuring an Excel Data Source

An Excel data source is an ODBC data source, however, you can very easily add an Excel data source by following the steps below.

Note: an Excel data source must refer to an Excel file having data in a Table representation, with the first row used as Column Header

1. Close the Excel file concerned.
2. Move the Excel file into the Click and DECiDE Administration Manager **Data Source** tab by using a drag-and-drop operation. The ODBC Setup will be created automatically.
   Note: each Excel Sheet will appear in the table list as a Table when creating a query with Click and DECiDE Builder.

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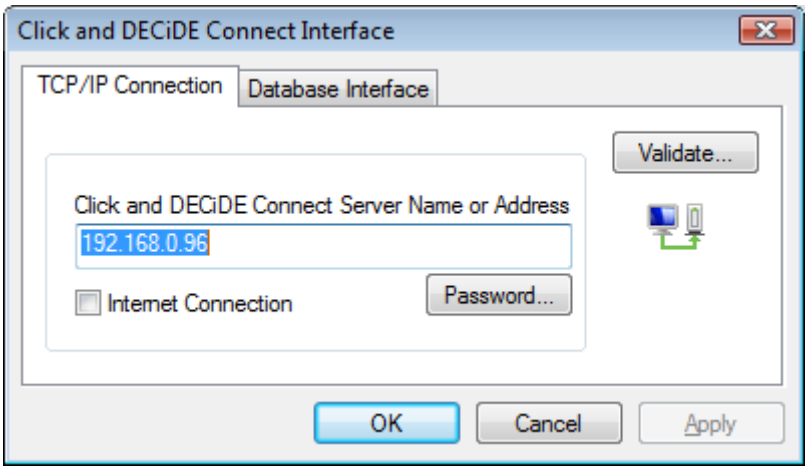
2.2.7. Configuring the Click and DECiDE Connect Data Source

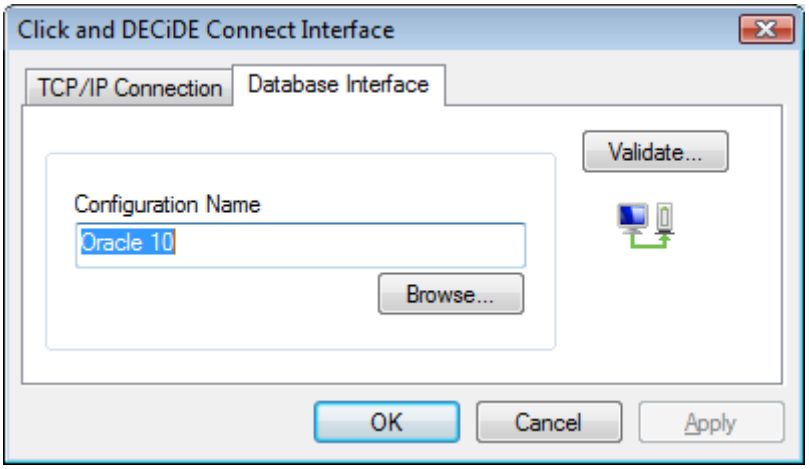
This internal data source allows a user from any workstation to access any data source whose setup is defined in the Click and DECiDE Administration Manager.

The following example, explains how to create an Oracle 10 data source using a Connect Data Source, the client workstation does not have an Oracle proprietary client module and the Server has a proprietary client module.

1. Select the **TCP/IP Connection**.
2. Specify the **Click and DECiDE Connect Server Name or Address**.



3. Select the **Database Interface** tab.



4. Click **Browse...** to view the data source list from the Server.
5. Select the corresponding Oracle data source.

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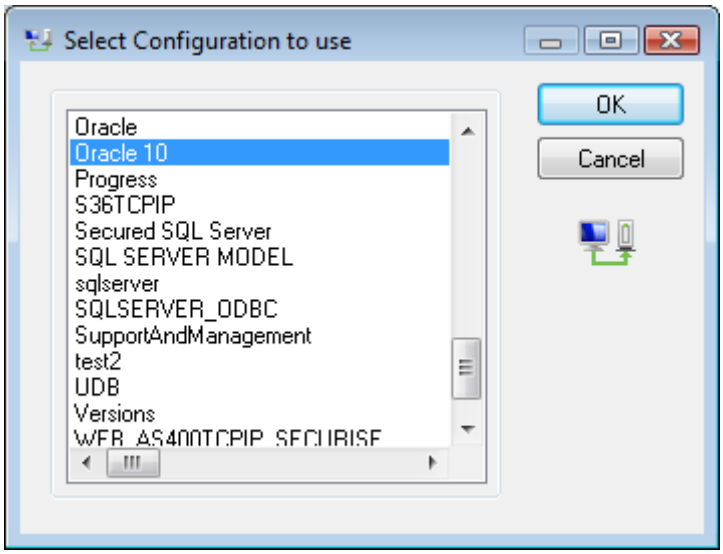

6. Click **OK** to validate.
7. Click **Validate**.
8. Confirm the login.

2.2.8. Configuring the Click and DECiDE Model Data Source

This internal data source allows a user from any workstation to access a Click and DECiDE Model data source whose setup is defined in the Click and DECiDE Administration Manager. A Click and DECiDE Model data source is a specific data source corresponding to one or several views (or domains) defined with the Click and DECiDE Model module, which allows you to create end users views with:

- Predefined join conditions between several tables.
- Hidden fields.
- Predefined calculation fields.
- Hidden criteria.
- Columns renamed with the names you want.

The benefit for the end user is that they get a view as a single table, which makes it very user-friendly as the technical features are already prepared inside the Model (join, calculation fields and so on).

The benefit for the Administrator is that it gives access to filtered information to the end user and hides unauthorized data.

Click and DECiDE Model allows you to create criteria depending on the user logon. For example a user named Smith will only see data for the SOUTH Area from a Model, whereas another user named Baxter will see data from the same Model but for the NORTH Area.

For more information, please refer to the Click and DECiDE Model Manual.

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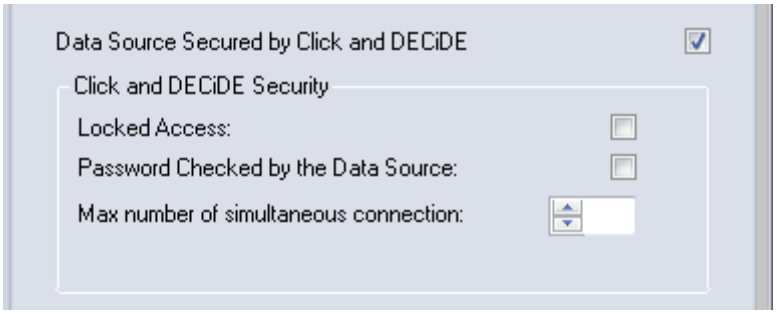
2.3. Working with the Data Source Secured by Click&DECiDE Option

When a data source is not secured by Click and DECiDE Administration Manager it is not authorized for one or several User Groups, and then it is authorized to any client user located on a remote workstation and using a Click and DECiDE Connect Data Source connected to the Server where the Click and DECiDE Administration Manager is installed. The benefit is that only the Server machine needs a proprietary client module to be installed to connect the Data Source. The remote workstation does not need this client module but can access the data source via the Server machine using the Click and DECiDE Connect Data Source.

When a data source is secured by the Click and DECiDE Administration Manager it can be assigned to each required User Group, which allows the Administrator to control the tables each User Group can access. The Administrator can only give access to a library or a list of specified tables, and customize each User Group according to the data they can access.

Note: for any connection via the Web Portal, the data source must be secured by Click&DECiDE.

Note: for security reasons a user from a client workstation cannot write inside a table which belongs to a data source secured by the Click&DECiDE Administration Manager.


Data Source Secured by Click and DECiDE
Click and DECiDE Security
Locked Access:
Password Checked by the Data Source:
Max number of simultaneous connection:

2.4. Configuring Click and DECiDE Security Options

Locked Access: allows to disable or enable the access to this Data Source for all users.

Password Checked by the Data Source: the password will be checked by the Data Source for a Click and DECiDE Connect data source. If you want to make this feature work via the Web Portal for the login, perform the following steps.

Note: the **Password Checked by the Data Source** can only be used if you activated Click and DECiDE Authentication in the Click and DECiDE Configuration Wizard.

1. Edit the ALIASES.INI file located in the C:\Program Files\Click and DECiDE\BAI directory.
2. Go to the [Web] section or create this section if it does not exist.
3. Add the following row:

   [Web]
   DataSourceForWebLogin=iSeries where iSeries is the data source name defined in Administration Manager.

   Warning: [Web] can already contain the following row: UseNTUserForWebLogin=1 if you are under Windows Authentication. The Password Checked by the Data Source can only be used if you are under Click and DECiDE Authentication is activated.

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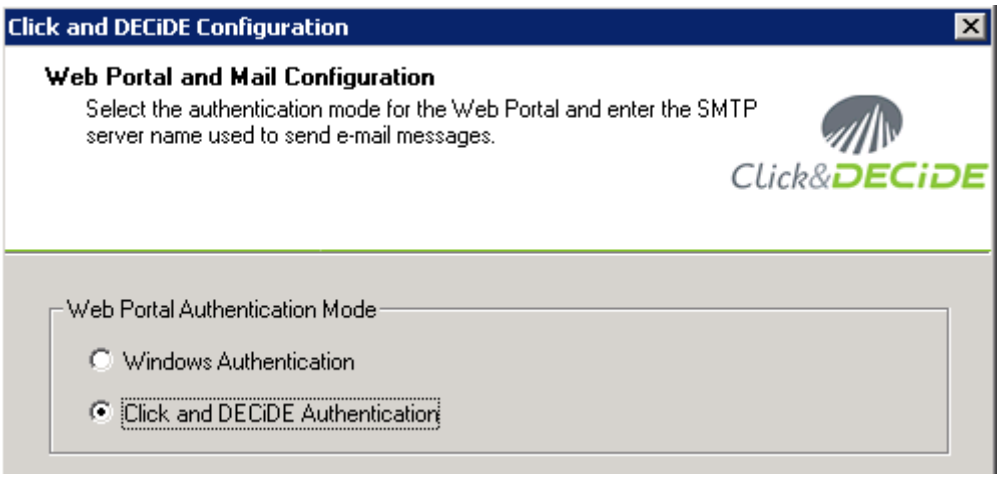
4. Activate Click and DECiDE Authentication in the Click and DECiDE Configuration Wizard if necessary. To do so, close all Click and DECiDE programs and run the Click and DECiDE Configuration Wizard, then change the Web Portal Authentication Mode when the following screen appears.


Click and DECiDE Configuration
Web Portal and Mail Configuration
Select the authentication mode for the Web Portal and enter the SMTP server name used to send e-mail messages.
Click&DECiDE
Web Portal Authentication Mode
Windows Authentication
Click and DECiDE Authentication

5. Note that once the new configuration is finished, the ALIASES.INI file contains the following:

```
[Web]
UseNTUserForWebLogin=0
DataSourceForWebLogin=iSeries
```

6. Click **File> Update Security** to update the Administration Manager's configuration.

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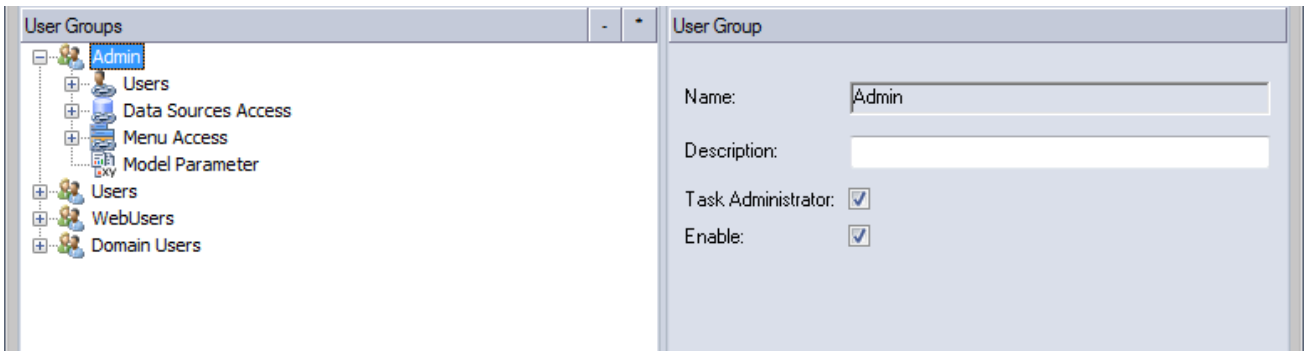
3. Working with the User Groups Tab

3.1. Working with User Group Definitions

The **User Group** tab enables you to add, remove or modify the User Groups definition.



Note: if you are under Windows Authentication, the Setup will automatically have inserted the Windows Group you belong to. For example, the Users Group named “Domain Users” in English or “Utilisa. du Domaine” in French. When selecting a User Group you can see the following options in the right pane.

Task Administrator: allows all users from the Group to access the following parts of the Web Portal: Scheduled Tasks, Web Parts Configuration, Content Builder and the Web Server Administration. For more information, please refer to the Click&DECiDE Web Portal Manual.

Enable: allows you to disable or enable all users belonging to a User Group at the same time. For example the Administrator can forbid a User Group to have direct access to any database or Web Portal access during a certain period.

Note: a **User Group** branch always displays four branches:

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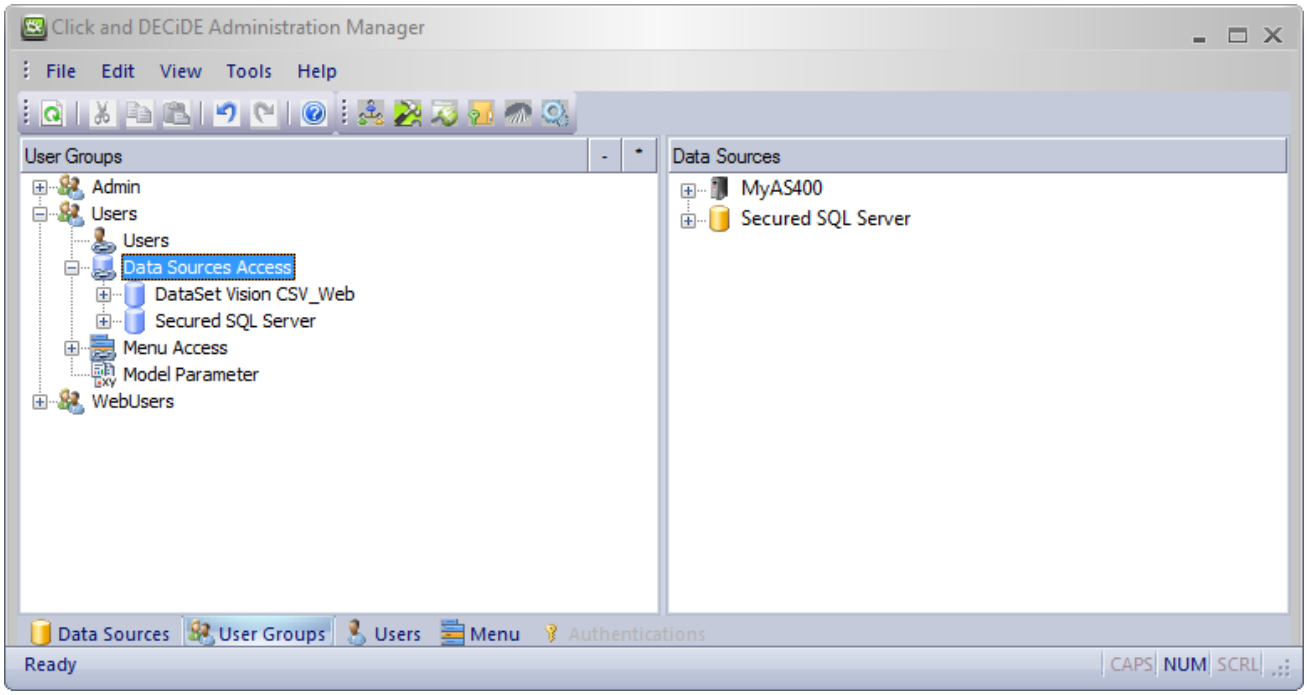
- **Users**: by default this does not contain any users if Windows Authentication is used, unless you need to declare certain users as CAL users (Client Access License). This branch contains identified Users if Click&DECiDE Authentication is used. Refer to the User tab.
- **Data Sources Access:** contains all **Secured** Data Sources assigned to the User Group. Refer to the Data Source tab.
- **Menu Access:** contains all the menus assigned to the User Group. Refer to the Menu tab.
- **Model Parameter:** this branch is empty by default, it can contain the parameters linked to a Click&DECiDE Model. Please refer to the Click&DECiDE Model Manual.

3.2. Assigning Data Sources to a User Group

Once the data sources you need have been created and the Secured mode has been activated, you must grant access rights for these data sources to the concerned User Groups. To do so, please follow the steps below.

1. Select the **User Group** tab.



2. Select the User Group you need to modify, for example the group “Users” which is a Windows Group.
3. Select the **Data Sources Access** branch.
4. Note all the data sources declared as “Secured by Click and DECiDE” appear in the right pane.
5. Click the Data Source you want, in this example click the AS/400 Data Source.
6. Enter your login details. The Library and table list will appear.

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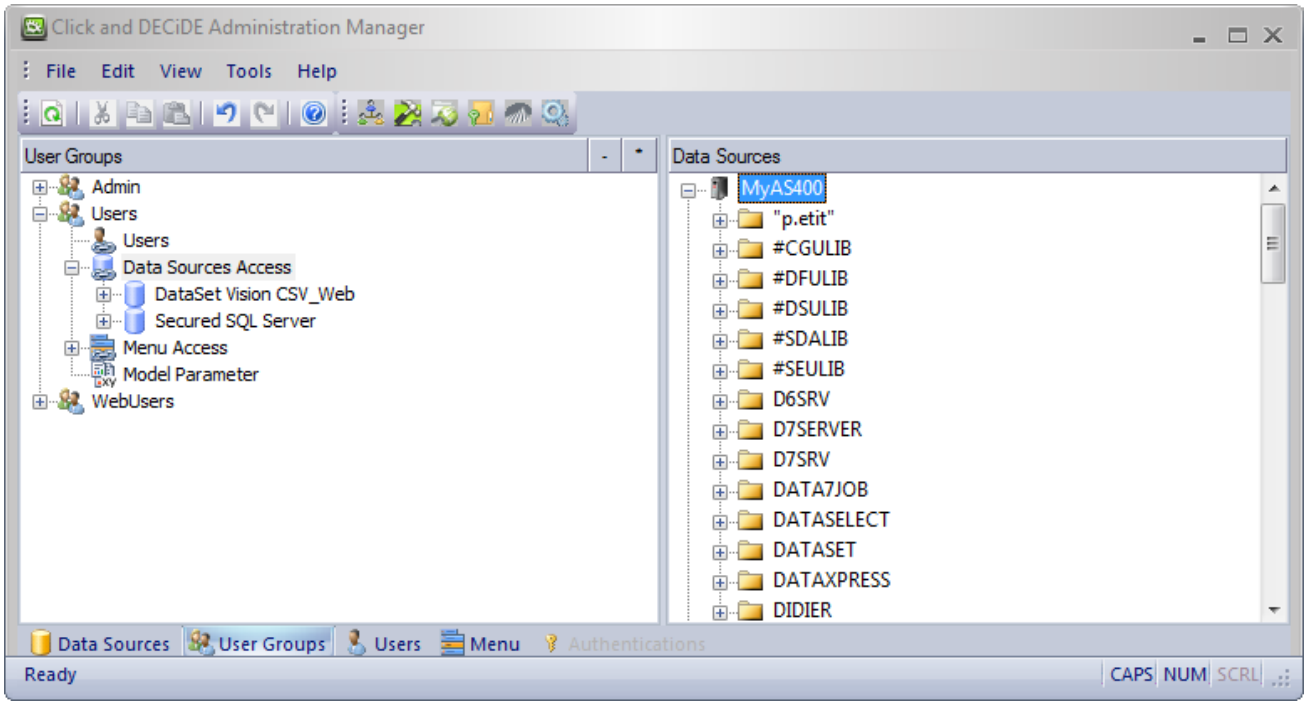
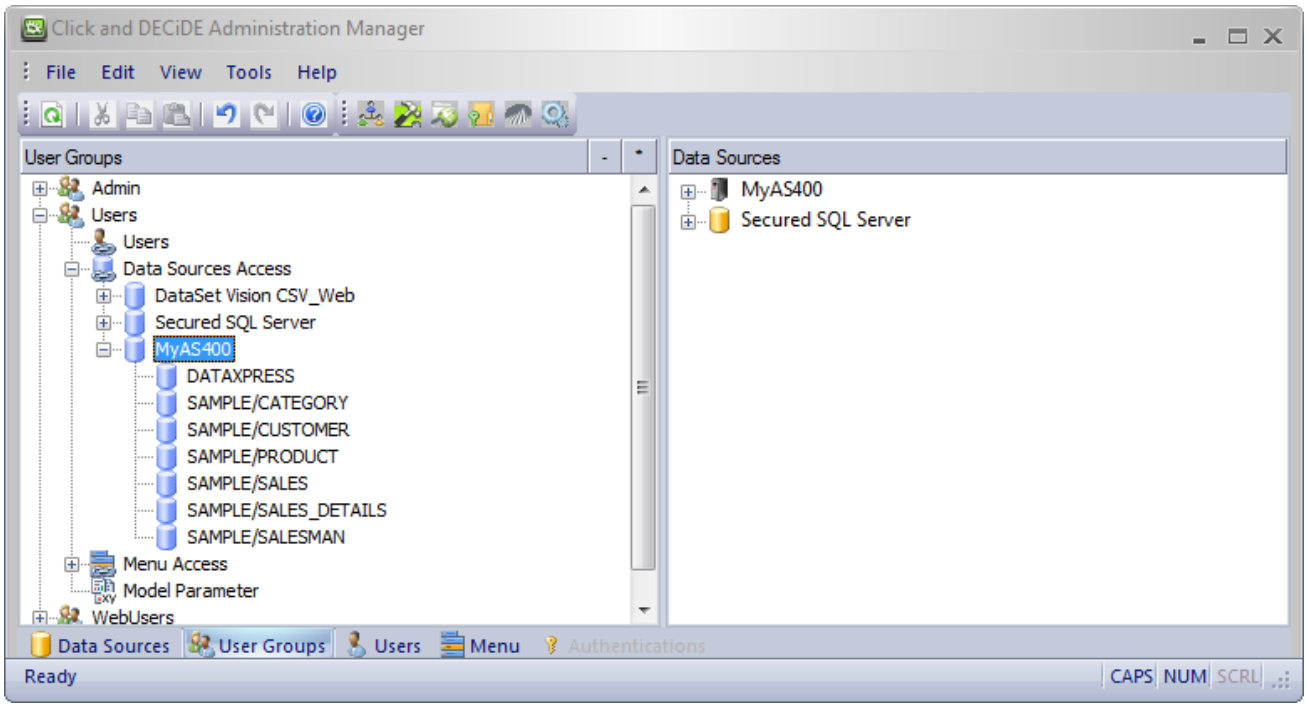


7. Select a library.
8. Select the tables you want or give access to the whole library if you do not want to limit the access to only some tables.



In the above example, the Group named “Users” will now have access to the full AS/400 library named “DATAEXPRESS” but will only have access to some tables in the SAMPLE library.

9. Select **File>** **Update Security** to update the Administration Manager’s configuration.

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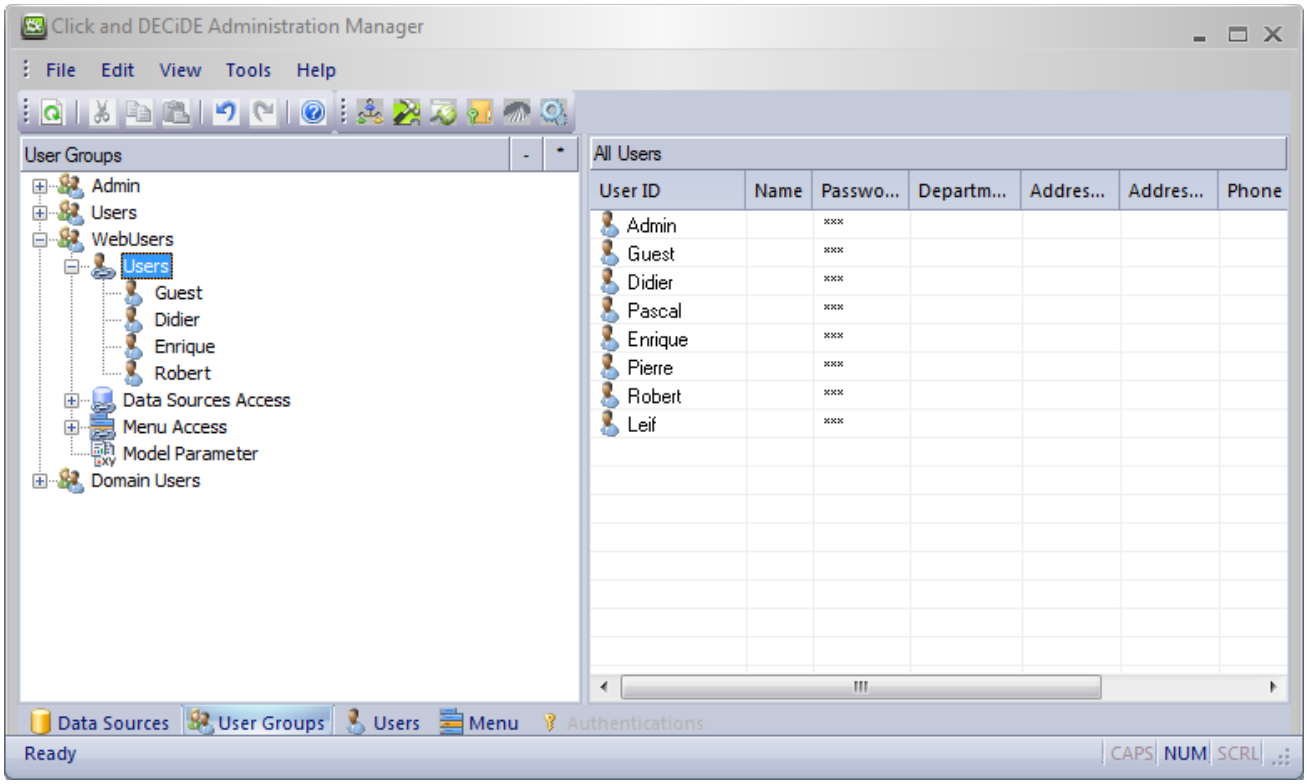
3.3. Adding Users to a User Group

Although no users are required when you are in Windows Authentication Mode, you may sometimes need to add or remove users in a User Group. For example if your license certificate contains some CAL users (Client Access License for identified users) or if you are in Click&DECiDE Authentication mode. To add users to a User Group, please follow the steps below.

1. Click the **User** branch in a User Group you want to add the user to.
2. Select the User in the **All Users** right pane.
3. Move the User to the **Users** branch in the **User Groups** pane using a drag-and-drop operation.



4. Select **File> Update Security** to update the Administration Manager's configuration.

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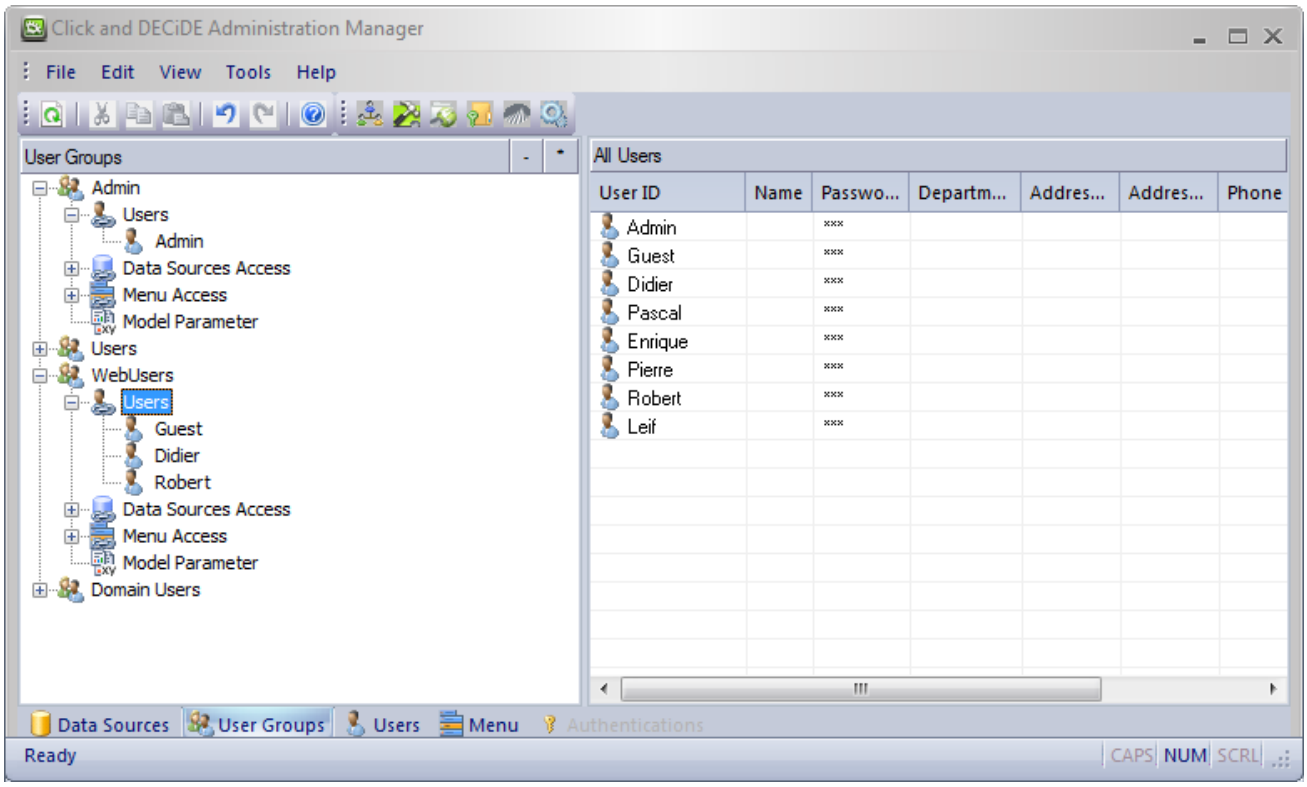
3.4. Removing Users from a User Group

To remove users from a User Group, please follow the steps below.

1. Click the **User** branch in the User Group you want to remove the user from.



2. Select the User in the list.
3. Press **Del**.
4. Click **File> Update Security** to update the Administration Manager's configuration.

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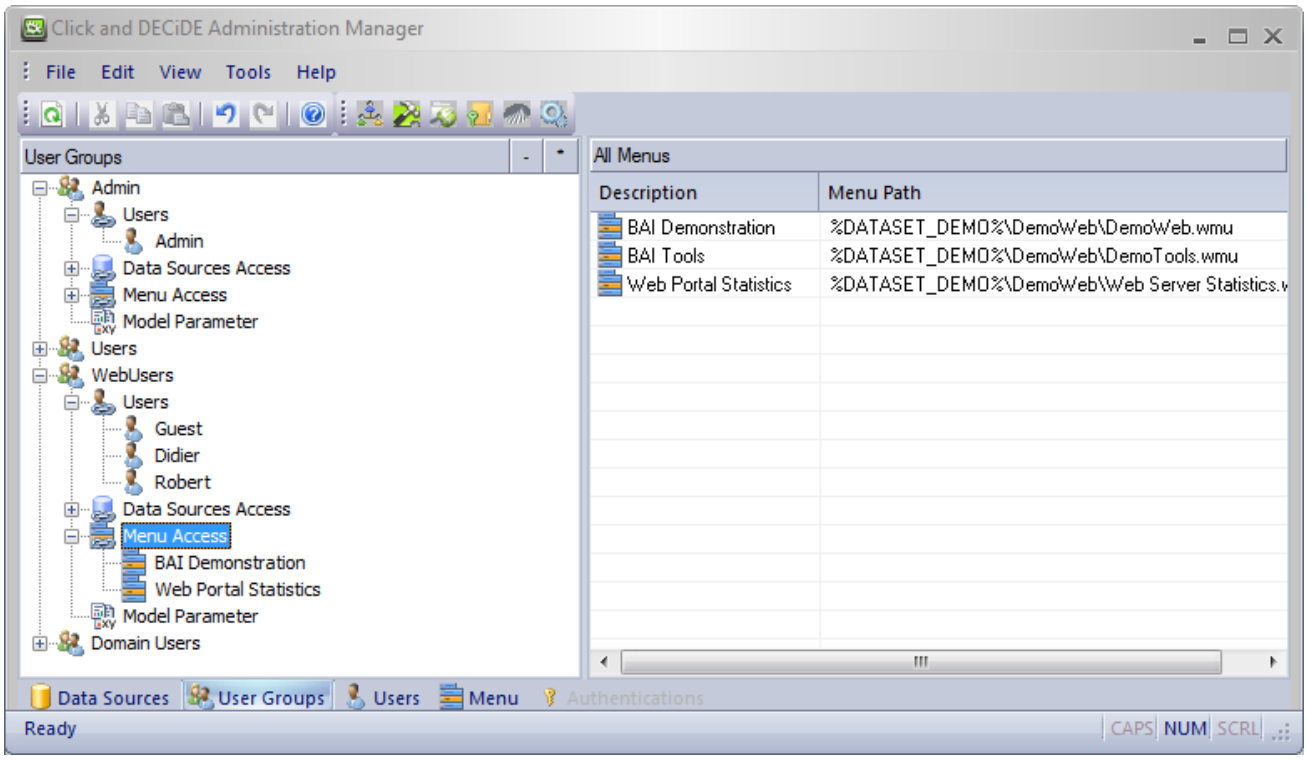
3.5. Adding a Menu to a User Group

To add an existing Menu to a User Group, please perform the following steps.

1. Click the **Menu Access** branch for a User Group.



2. Select the Menu in the **All Menus** right pane.
3. Move the Menu to the **Menu Access** branch in the **User Groups** pane using a drag-and-drop operation.
4. Select **File> Update Security** to update the Administration Manager's configuration.

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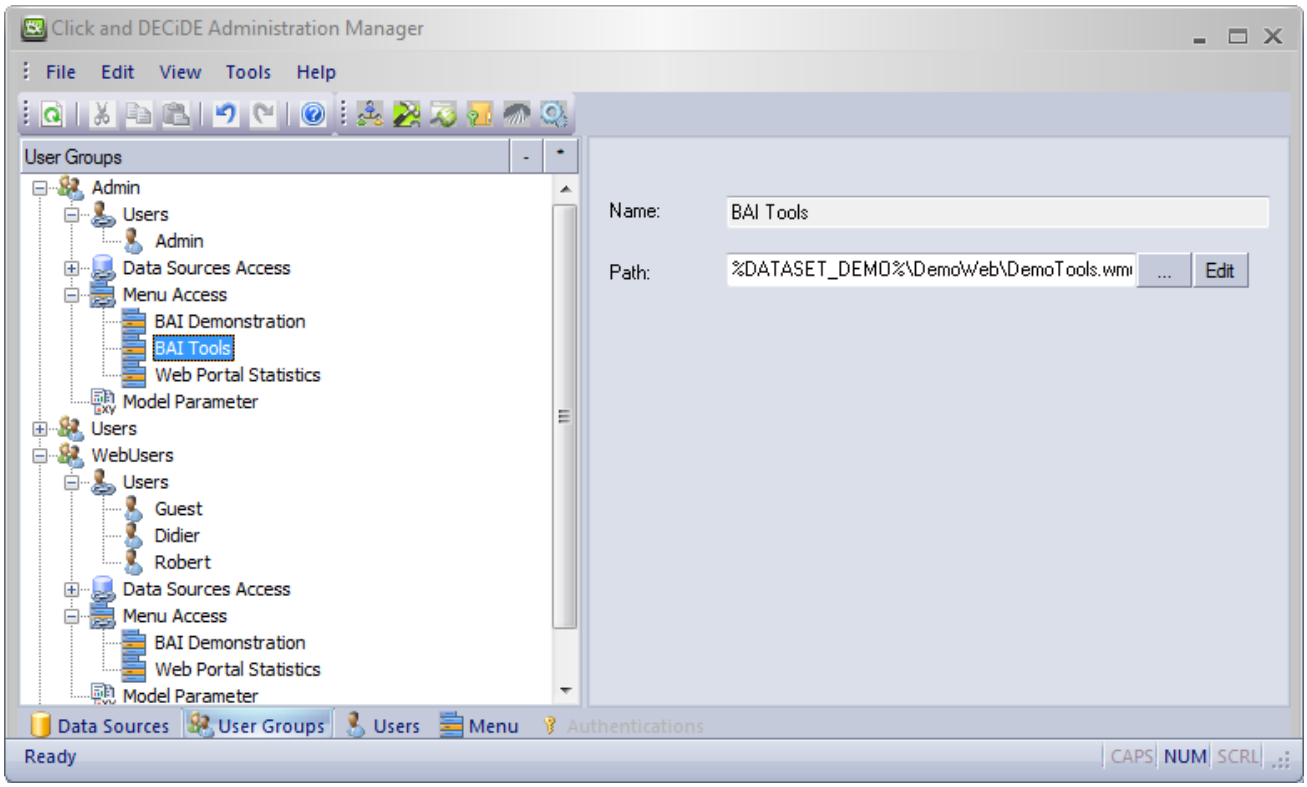
3.6. Removing a Menu from a User Group

To remove an existing Menu from a User Group, please perform the following steps.

1. Click the **Menu Access** branch for a User Group.



2. Select the Menu in the list.
3. Press **Del**.
4. Click **File> Update Security** to update the Administration Manager's configuration.

3.7. Modifying a Parameter Value for a Model

Please refer to the Click&DECiDE Model Manual for more information.

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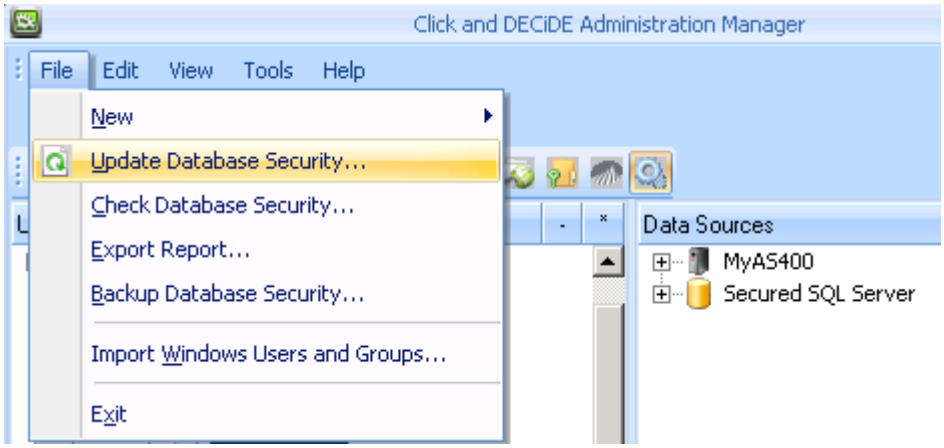
4. Updating Database Security

Each time you modify the access right inside the Administration Manager program, you must update the database security by selecting **File> Update Database Security** or by clicking the Update icon .

You must update Database Security when you create a data source, a User Group, a User and when you change any link between the Administration Manager Tabs (Data Source, User Group, User, Menu and Authentication).

This action will update internal files used by Click&DECiDE.



Note that if you close the Click&DECiDE Administration Manager without clicking **Update Database Security...** a message will appear asking if you want to update database security.. It is always recommended to do so to ensure that the configuration is updated.

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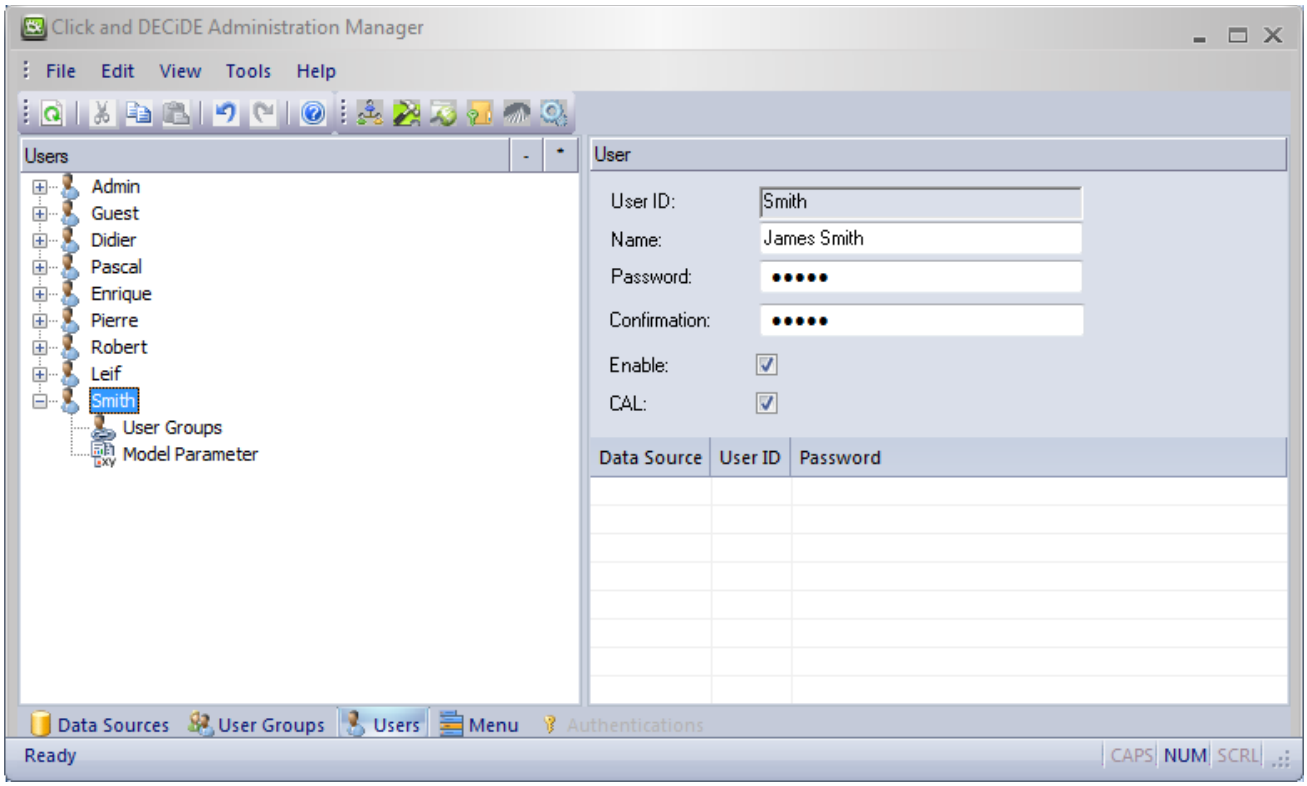
5. Working with the Users Tab

If the User Group is a Windows Group, all the users who belong to this Group will have the same access rights to the database tables as defined previously. Each user name does not need to be entered in the Administration Manager, except if you want to declare some of them as “CAL” users (according to your license certificate). A “CAL” (Client Access License) must be an identified user in the Administration Manager. If you only have concurrent users in your license certificate, you do not need to identify them in the Administration Manager.

5.1. Adding Users in the Users Tab

If the User Group is not a Windows Group, and if you are in Click and DECiDE Authentication mode, then you need to add the users you want to manage and add each user in a User Group. To add a user, please follow the steps below.

1. Select the **Users** tab.
2. Select **File> New> User** or right-click and select **New> User**. In the example below we are going to create the user James Smith and declare him as a **CAL** user.



3. Enter the following details in the right pane for each user:
   User ID: this is mandatory.
   Name: this is Optional.
   Password: this is optional, depending on the Authentication mode used.
   Enable: allows the Administrator to disable or enable a specific user without disabling the whole User Group. For example the Administrator can forbid a user to have direct access to any database or to the Web Portal for a certain period.
4. Add this user to the required User Group, for example WebUsers.

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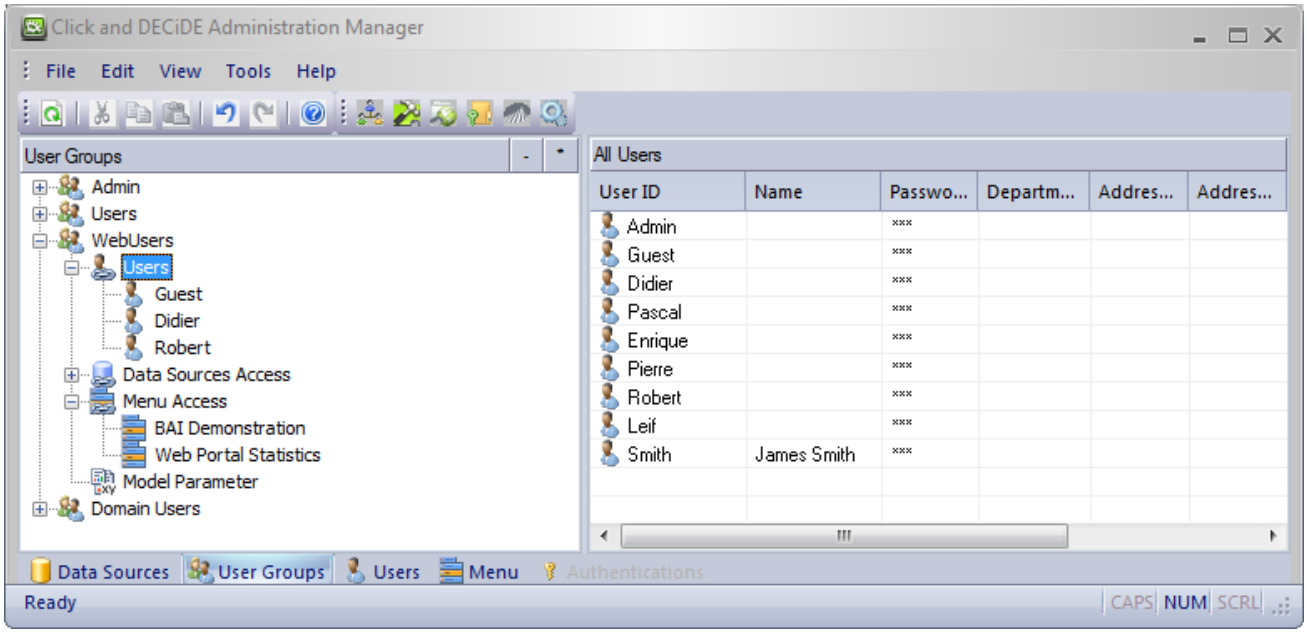
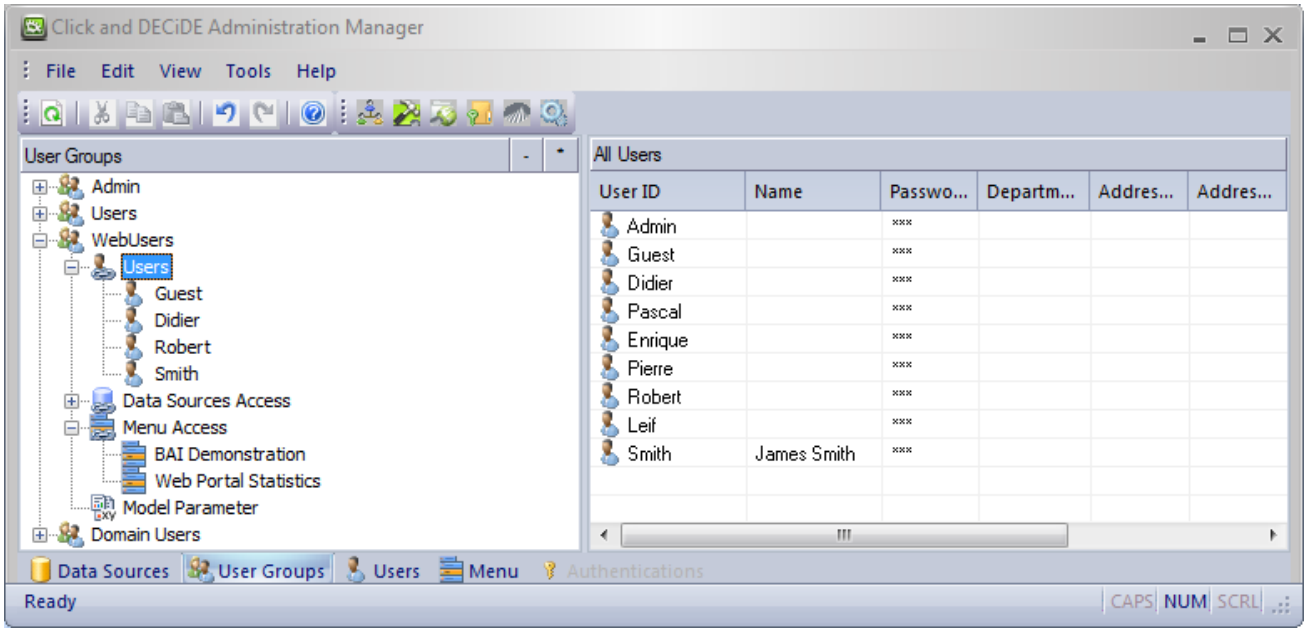
5. Click the **User Groups** tab.
6. Select the **WebUsers** group.
7. Select the **Users** branch.



8. Select the new user, for example Smith in the right **All Users** pane.
9. Move the new user from the **All Users** pane to the **Users** branch in the left **User Groups** pane using a drag-and-drop operation.



10. Add the data sources that you want to authorize for the WebUsers group. In this example the MyAS400 data source has been added to the authorized data sources for the WebUsers group.
11. Click the **Update Security** icon to validate the changes.

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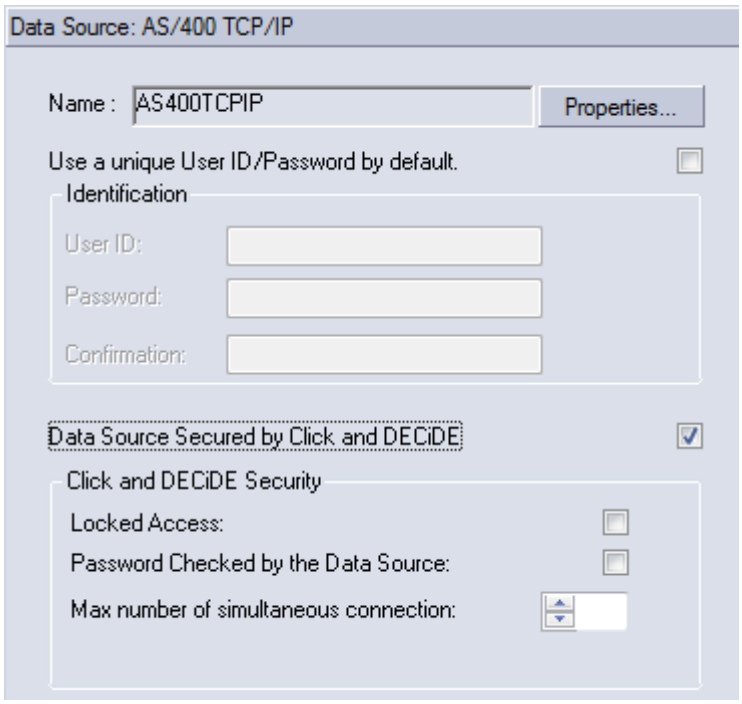
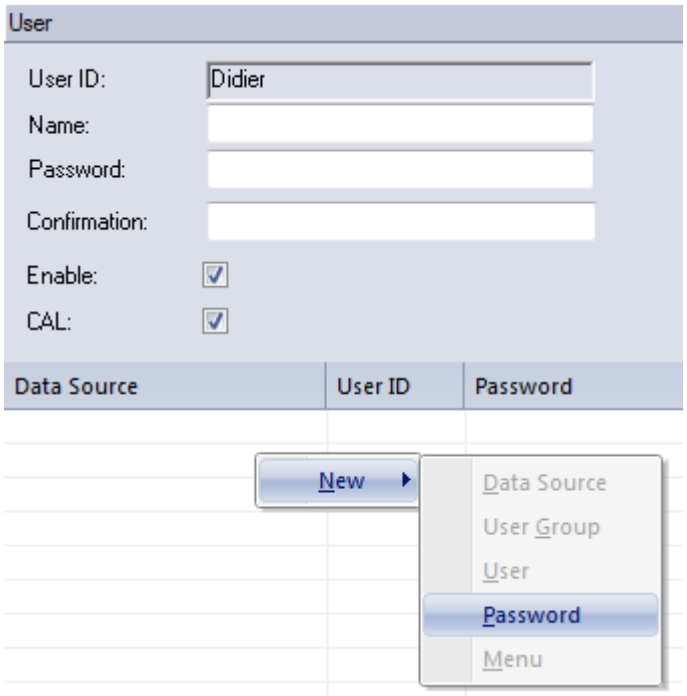
5.2. Specifying Data Source Login for each user

If a data source is defined in Click and DECiDE Administration Manager but you do not want to use a unique User ID/Password by default for all users, as in the following picture:



it is possible to define in the Users Tab a specific login for one or several data sources. To do so, select the User in the User Tab and make a right mouse click in the right bottom window and select **New> Password**:



Select the Data Source Name and enter the User login:

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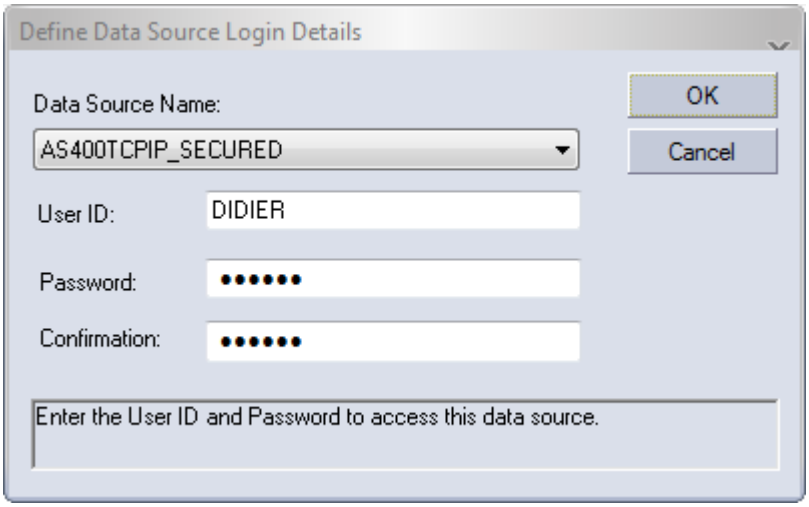
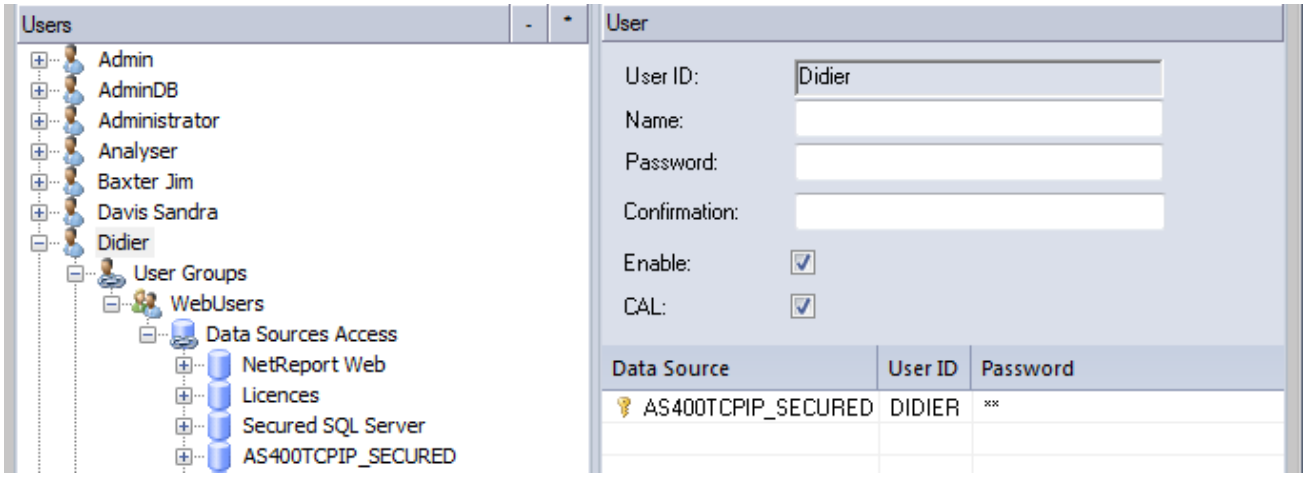


Click OK to validate:



When the above user will connect to the AS400TCPIP_SECURED data source, the iSeries login sent to the data base will be the one defined in the above screen, being specific to each user.

If you wish to remove any row in the right bottom frame, select the required row and click the command **Edit> Delete**.

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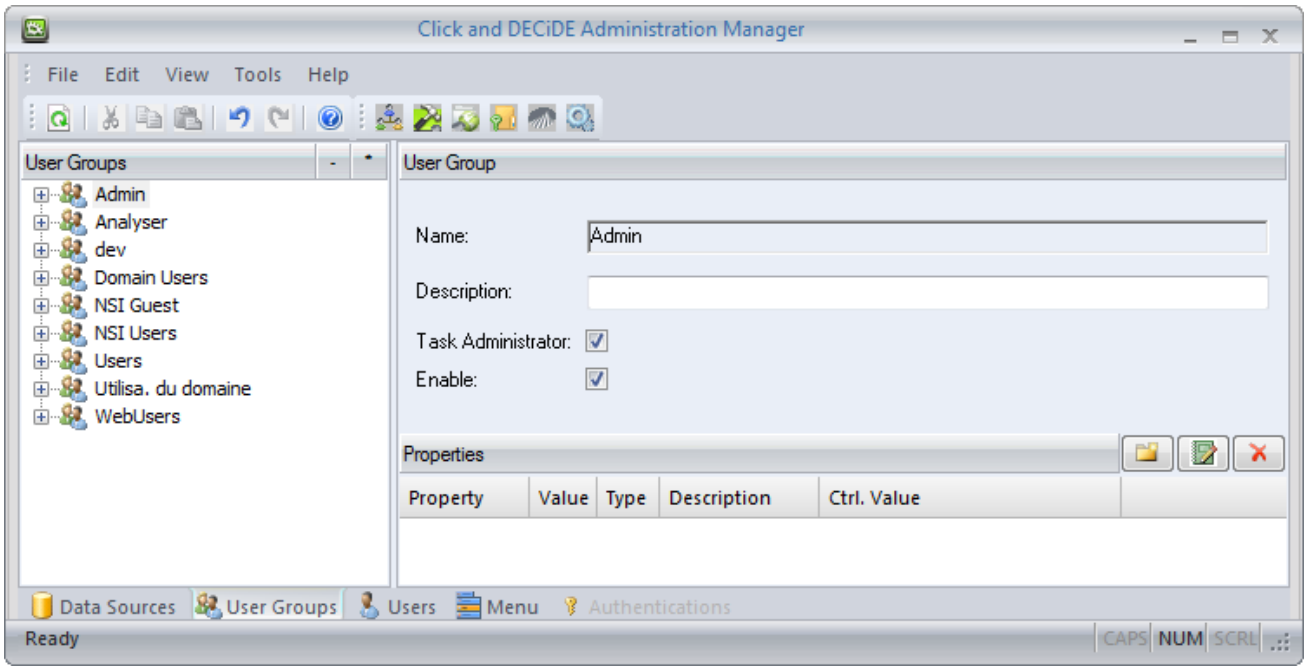
6. Using Group and User Group Properties

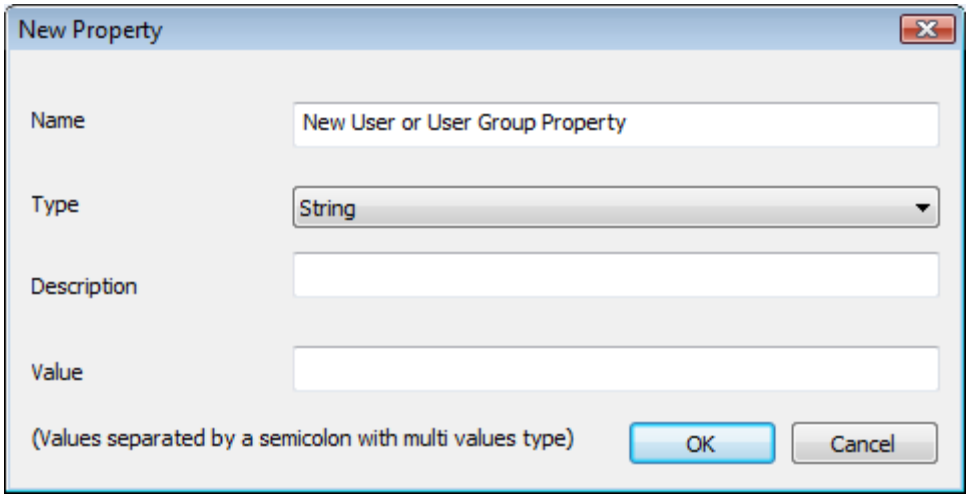
A “Property” is new feature since version 10.2.1 allowing to apply some criteria to a Group and/or a User Group, decided by the Administrator. Later, when running a query, report or cube through the Web Portal or a Click&DECiDE Connect Data Source, the end-user will retrieve data filtered by this property.

Example: if a Property allows a User to get data only from SOUTH and EAST areas, any query, report or cube based on this Property, will only return data for the SOUTH and EAST areas. If this User belongs to a Group whose Property also authorize to see the NORTH-WEST area, then the user will get records corresponding to the SOUTH, EAST and NORTH-WEST areas.

When you select a Group or a User Group, you can see on the right pane a “Properties” frame with 3 buttons:



6.1. The first button allows to create a new Property:



Name: enter a name for the Property (this name will be used later in a Click&DECiDE Builder parameter – Refer to the Click&DECiDE Builder Query User Guide).

Type: select the required type for single values among String, Numeric, Date, Time or Timestamp. Note that for multiple values you must select the **Multi values** Type whatever will be the field type.

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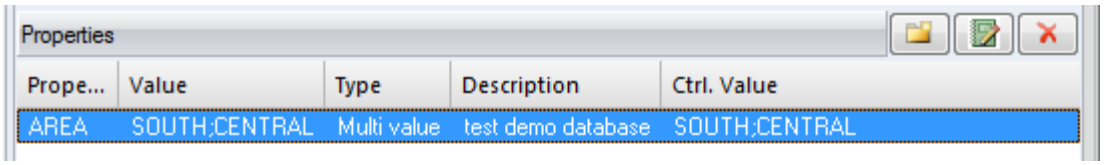
Description: optional, you can enter here a text to remember the purpose of the property.

Value: if empty, nothing will be applied for the Group and User group whose Property value is empty. If not empty, you can enter a single value or several values with a semicolon separator if Multi values type has been chosen.

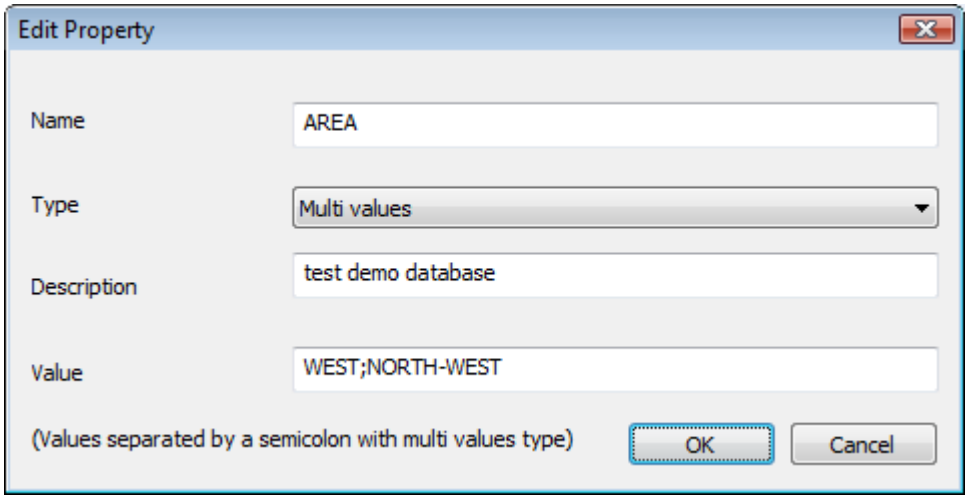
Validate with **OK**



Click the **Update Security** icon to validate the changes.

6.2. The second button allows to edit an existing Property:

Click this icon to edit and modify an existing property. Example: with the Click and DECiDE Web Demonstration.wfv project file, all queries inside have a parameter calling the property named AREA. You can thus enter the following values to test this feature with the demo database:



All available values for AREA are: ATLANTIC;CENTRAL;NORTH-WEST;SOUTH;WEST

Click the **Update Security** icon to validate any changes.

6.3. The third button allows to remove partially or totally an existing Property:

Click this icon if you wish to clear the values for a Group or User Group or if you wish to remove this property for all Groups and User Groups.

The following choice will be prompt:

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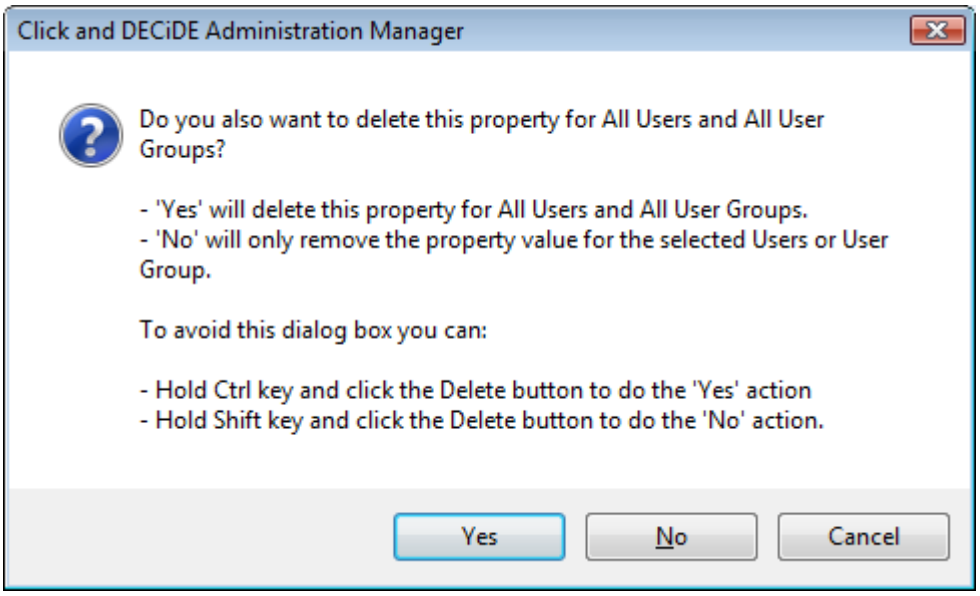
Click and DECiDE Administration Manager
Do you also want to delete this property for All Users and All User Groups?
- 'Yes' will delete this property for All Users and All User Groups.
- 'No' will only remove the property value for the selected Users or User Group.
To avoid this dialog box you can:
- Hold Ctrl key and click the Delete button to do the 'Yes' action
- Hold Shift key and click the Delete button to do the 'No' action.
Yes
No
Cancel

6.3.1. Remove partially a Property for a Group or User Group

Click **No** to only clear the value(s) for the selected Group or User Group

Click the **Update Security** icon to validate any changes.

6.3.2. Remove totally a Property for all Groups and User groups

Click **Yes** to delete this property for all Groups and User Groups. Make sure that no query is still using this Property in your Click&DECiDE or Dashboard applications.

Click the **Update Security** icon to validate any changes.

6.3.3. Do not make any change

Click **Cancel** to do not apply any change.

6.4. How a property is used inside a Click&DECiDE Query?

You can see several examples by opening the Click and DECiDE Web Demonstration.wfv project file in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.

Open for example the “demo_multicriteria” query

Click **Query**> **Parameter** to open the Parameter Dialog Box

Select the parameter named **PropertyArea**

As you can see in the next picture, this parameter is updated by a **User Property**, is optional and the name of the UserPropety is AREA, defined in Administration Manager as described previously as an example.

When a User Property is optional, the value IGNORE will be used in the query.

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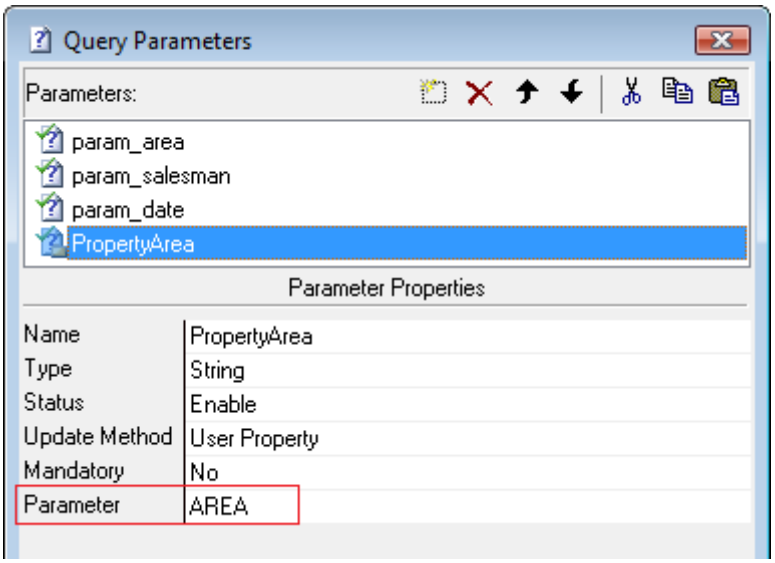

For more information, please refer to the Click&DECiDE Builder Query User Guide.

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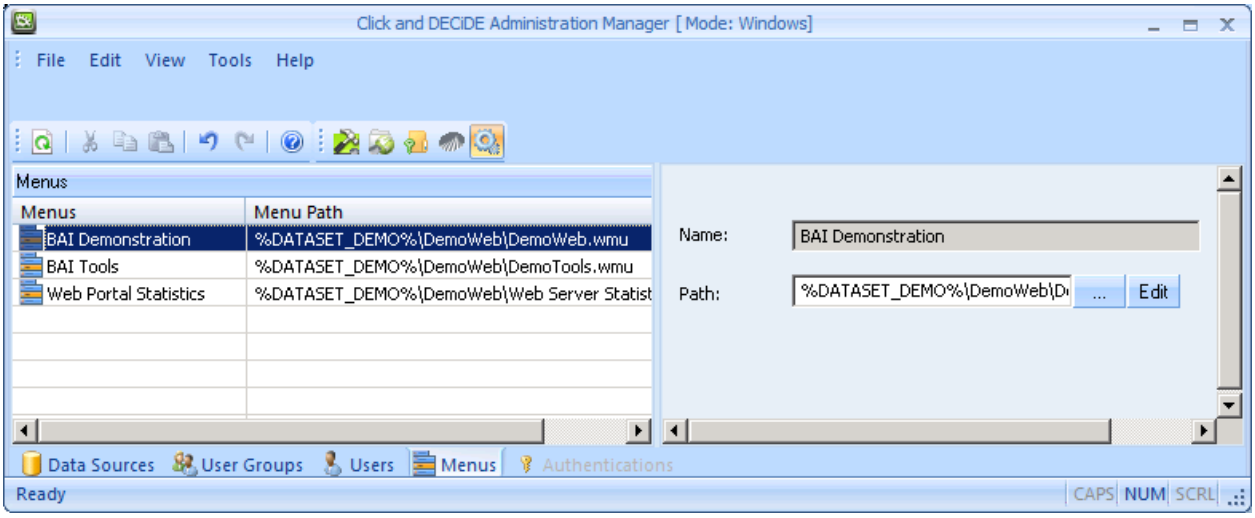
7. Working with the Menu Tab

The **Menu** tab allows the Administrator to add or remove Menus, previously created with Click&DECiDE Web Menu. The Administrator can define the menu name that should be displayed via the Web Portal and the path to the menu file with the .wmu extension.



7.1. Adding an Existing Menu

To add an existing menu in the left Menu pane, please follow the steps below.

1. Select **File> New> Menu**, or right-click and select **New> Menu**.
2. Change the default “New Menu” name by the name you want.
3. Click the Path Browse button in the right pane, to find the menu file with the .wmu extension on the hard disk.
4. Click in the left pane to view the Menu Path.
5. Modify the path to replace the beginning of the path with an environment variable if necessary.
6. Click **File> Update Security** to update the Administration Manager’s configuration.

7.1. Removing an Existing Menu

To remove an existing menu from the left pane list, please follow the steps below.

1. Select the menu you want to delete from the left **Menus** pane.
2. Press **Del**.

   Note: this action will not delete the menu file from the hard disk, but only from the menu list.

7.2. Creating a New Menu

To create a new menu in the left **Menus** pane, please follow the steps below.

1. Select **File> New> Menu**, or right-click and select **New> Menu**.
2. Change the default “New Menu” name by the name you want.
3. Click **Edit** in the right pane. This action will launch the Click and DECiDE Web Menu and create an empty new menu, ready to be defined with the branches you need to create. See further Use of Click and DECiDE Web Menu.

7.3. Modifying an Existing Menu

To modify an existing menu which can be seen in the left **Menus** pane, please follow the steps below.

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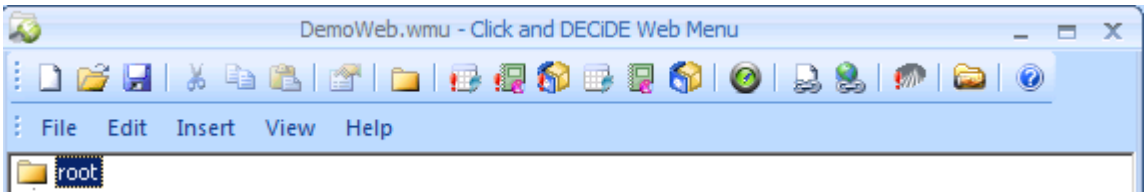
1. Select the menu you want to modify in the left **Menus** pane.
2. Click **Edit** in the right pane. This action will launch Click and DECiDE Web Menu and will open the menu you selected to modify. Modify the menu as appropriate. See further Use of Click and DECiDE Web Menu.

7.4. Working with Click and DECiDE Web Menu

When Click and DECiDE Web Menu is launched the following screen appears.



The “root” in the central pane is not visible in the Web Portal, however you can modify it, replacing “root” by the name of the menu that you specified in the Administration Manager **Menu** tab.

The toolbar includes the following icons:

inserts a New Folder, allowing you to create branches and sub-levels if necessary.

inserts a Click&DECiDE Dynamic Query

inserts a Click&DECiDE Dynamic Report

inserts a Click&DECiDE Dynamic Cube

inserts a Click&DECiDE Static Query (a query that is already published in HTML format)

inserts a Click&DECiDE Static Report (a report that is already published in HTML format)

inserts a Click&DECiDE Static Cube (a cube that is already published in HTML format)

inserts a Click&DECiDE Dashboard.

inserts a link to a file (Excel, PDF, Word and so on.)

inserts a URL.

inserts a link to Click&DECiDE Builder running on a specified Secured Data Source.

inserts a Shared Folder.

7.4.1. Inserting a New Folder

To insert a new folder, please follow the steps below.

1. Click the **New Folder** icon to insert a static branch whose name can be modified.
   Note: if a branch already exists, make sure the mouse cursor is on the correct location before adding a new folder.

2. Create a sub-folder in the folder you want.

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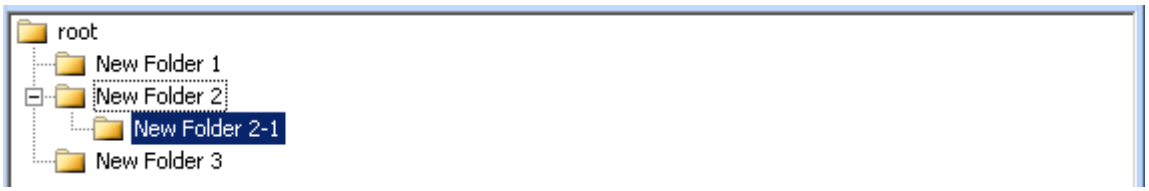

3. Rename the folders as follows: Queries, Reports and Cubes.

7.4.2. Inserting a Click&DECiDE Dynamic Query

To insert a dynamic query, please follow the steps below.

1. Select the **Queries** folder.
2. Click the **Dynamic Query** icon in the toolbar to add a dynamic query.

3. Rename the default name **Dynamic Query** with the name you want. For example **Invoices**.

4. Double-click the new Dynamic Query branch or click the icon to open **Click and DECiDE Query** property sheet.
5. Click the **Browse...** button.
6. Select the required Click&DECiDE project file (*.wfv).
7. Select the **Invoices** query in the proposed item list. This example uses the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
8. Replace the beginning of the path with an environment variable if necessary.

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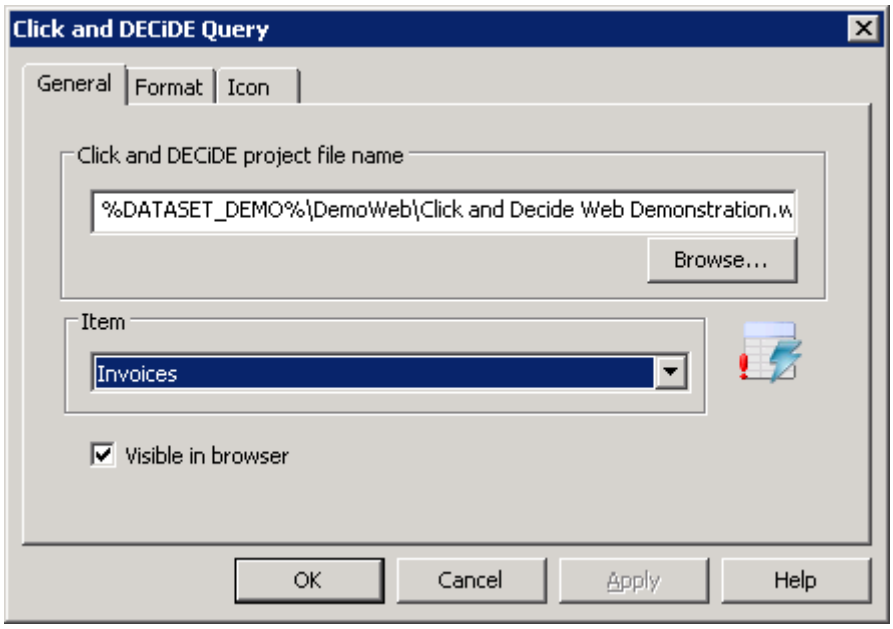

9. Clear the **Visible in browser** check box if you want to hide this item in the Web Portal. In this example we are going to select the **Visible in browser** check box.
10. Click the **Format** tab to specify the authorized **output formats**.

    Note: only the selected formats will be proposed to end users in the Web Portal. More information about the output formats is given in the Menu Web Output Format section.
11. Click **OK**.

7.4.3. Inserting a Click&DECiDE Dynamic Report

To insert a dynamic report, please follow the steps below.

1. Select the **Reports** folder.
2. Click the **Dynamic Report** icon icon.

3. Rename the default folder name **Dynamic Report** to the report name you want. For example **Sales by Area**.

4. Double-click the new **Dynamic Report** branch or click the icon to open the **Click and DECiDE Report** property sheet.

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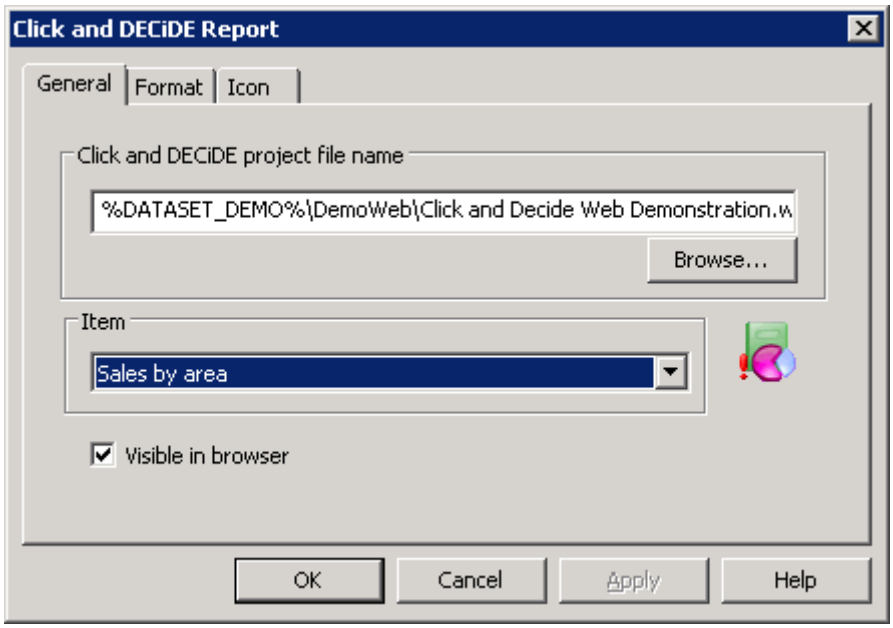
5. Click the **Browse...** button.
6. Select the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
7. Select the **Sales by area** report.
8. Replace the beginning of the path with an environment variable if necessary.

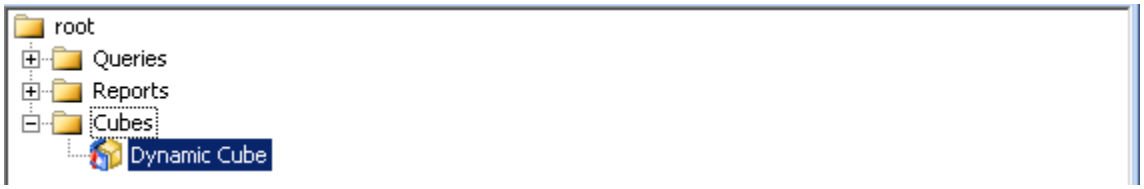


9. Select the **Visible in browser** check box if you want the item to be visible in the Web Portal. Clear the check box if you want to hide this item in the. This option is used when a report calls another hidden report, however you need to know the URL report inside the Menu to create the hyperlink. (Refer to the Click and DECiDE Report Manual).
10. Click the **Format** tab to specify the authorized **output formats**. A report can be exported in HTML and PDF format with a WYSIWYG presentation and in Excel format when only data is exported, including breaks levels if exist.
11. Click **OK**.

7.4.4. Inserting a Click&DECiDE Dynamic Cube

To insert a dynamic cube, please follow the steps below.

1. Select the **Cubes** folder.
2. Click the **Dynamic Cube** icon.



3. Rename the default name **Dynamic Cube** to the name you want. For example **Sales by year and by Salesman**.

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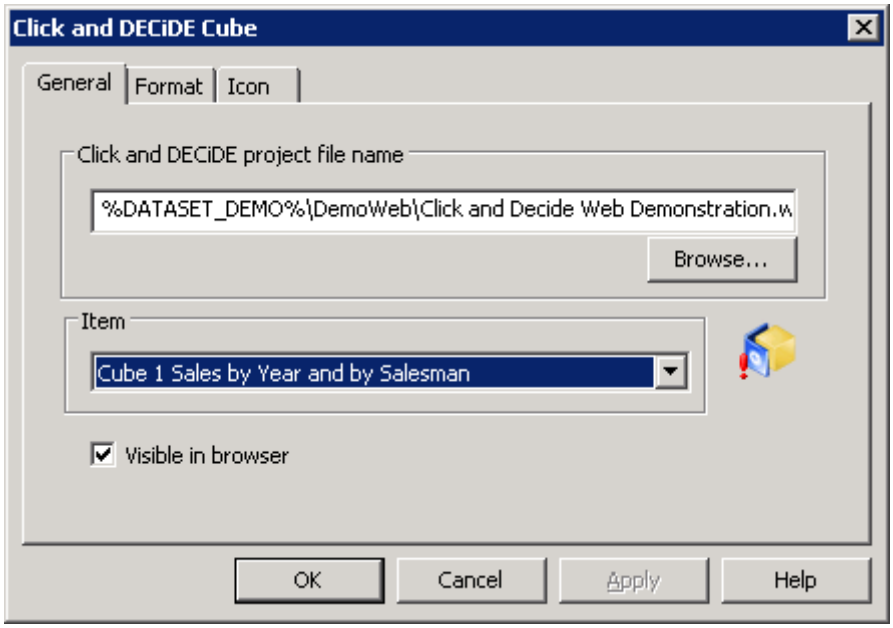
4. Double-click the new Dynamic Cube or click the icon to open the **Click and DECiDE Cube** property sheet.
5. Click the **Browse...** button.
6. Select the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
7. Select the **Cube 1 Sales by Year and by Salesman** cube.
8. Replace the beginning of the path with an environment variable if necessary.



9. Select the **Visible in browser** check box if you want the cube to be visible in the Web Portal. Clear the check box if you want to hide the check box in the Web Portal.
10. Click the **Format** tab to specify the authorized **output formats**. A cube is mainly exported to **HTML** format. This allows the user to manipulate the dimensions and measures in the dynamic cube.
Note: that exporting the cube to PDF format will generate a static PDF file with the cube inside but it will not be possible to use the condensed or detailed modes nor with the dimensions and measures. A cube can also be sent to **Excel 2007**, this is a new feature in Click and DECiDE version 10.1.
11. Click **OK**.

7.4.5. Inserting a Click&DECiDE Static Query

To insert a static query, please follow the steps below.

1. Select the **Queries** folder.
2. Click the **Static Queries** icon.

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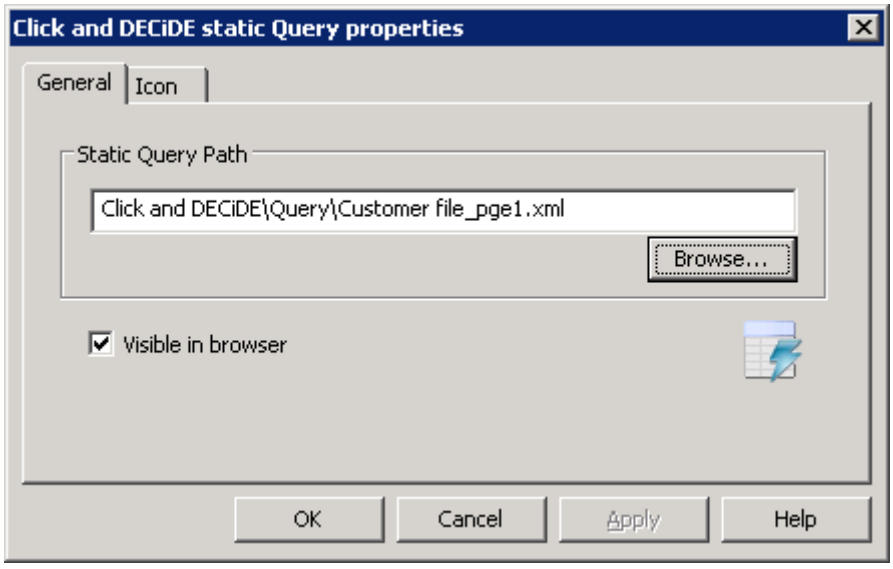
3. Launch Click&DECiDE Builder, select **Start> All Programs> Click and DECiDE> Builder** in the **Start** menu.
4. Open the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
5. Open the **Customer file** query.
6. Export the query by selecting **File> HTML> Publish to Web Portal**.
7. Select the target directory in C:\Program Files\Click and DECiDE\BAI\web\publication\Click and DECiDE\Query (create the last directory Query). Note the following file name will be proposed **Customer file.cndr**
8. Click **OK**.
9. Rename the default name **Static Query** to **Customer List**.
10. Double-click the new static query or click the icon to open the **Click and DECiDE static Query properties** property sheet.
11. Click the **Browse...** button.
12. Select the **Customer file_pge1.xml** file located in the C:\Program Files\Click and DECiDE\BAI\web\publication\Click and DECiDE\Query directory.



13. Select the **Visible in browser** check box if you want the static query to be visible in the Web Portal. Clear the check box if you want to hide the static query in the Web Portal.
14. Click **OK**.

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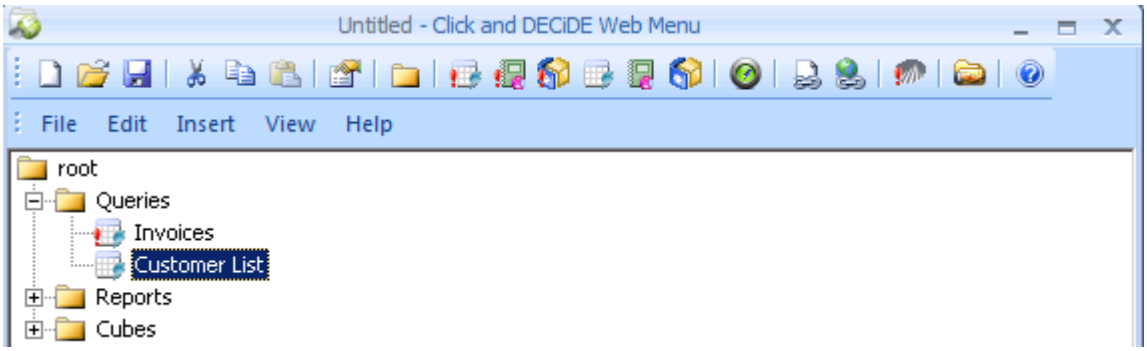

7.4.6. Inserting a Click&DECiDE Static Report

To insert a static report, please follow the steps below.

1. Select the **Reports** folder.
2. Click the **Static Report** icon.

3. Rename the default Static Report name with the name you want, for example **Sales by Category**.

4. Double-click the new static report or click the icon to open the **Click and DECiDE Static Report Properties property sheet**.
5. Click the **Browse...** button.
6. Select the **Sales by category_pge1.xml** file located in the C:\Program Files\Click and DECiDE\BAI\web\publication\Click and DECiDE\Report\Sales by category directory.

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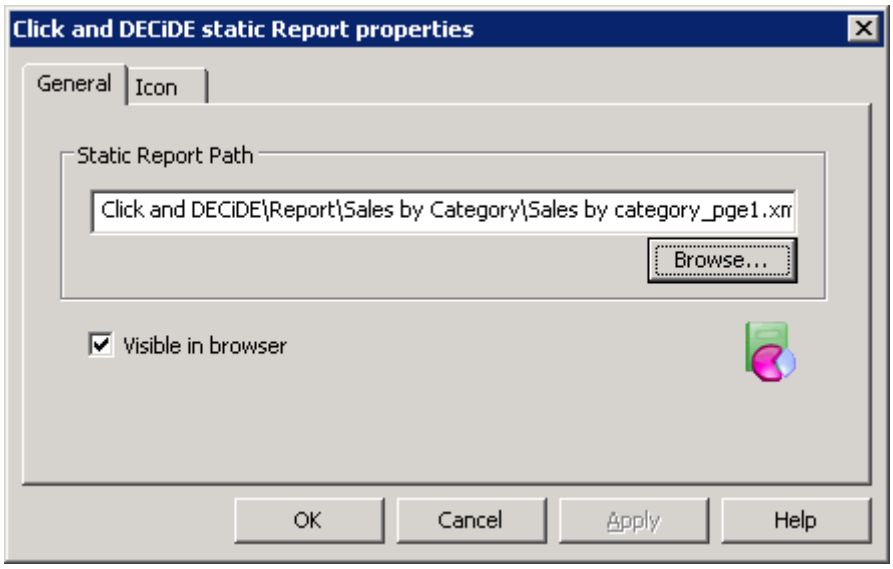

7. Select the **Visible in browser** check box if you want the static report to be visible in the Web Portal. Clear the check box if you want to hide this item in the Web Portal if necessary.
8. Click **OK**.

7.4.7. Inserting a Click&DECiDE Static Cube

To insert a static cube, please follow the steps below.

1. Select the **Cubes** folder.
2. Click the **Static Cube** icon to add a static cube.

3. Launch Click&DECiDE Builder, select **Start> All Programs> Click&DECiDE> Builder** in the **Start** menu.
4. Open the Click and Decide Web Demonstration.wfv project file located by default in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
5. Open the following cube: **Cube 5 Products, Salesmen and Customers Hierarchies**.
6. Select **File> HTML> Publish to Web Portal** to export the cube.
7. Select the target directory in C:\Program Files\Click and DECiDE\BAI\web\publication\Click and DECiDE\Cube (create the last directory: Cube). The following cube name will be proposed **Cube 5 Products, Salesmen and Customers Hierarchies.html**.
8. Click **OK**.
9. Click **Yes** at the base of the **Do you want to refresh data?** Message.
10. Right-click the **Static Cube**.
11. Select **Rename** and rename the default Static Cube name to the name you want, for example **Products, Salesmen and Customers**.

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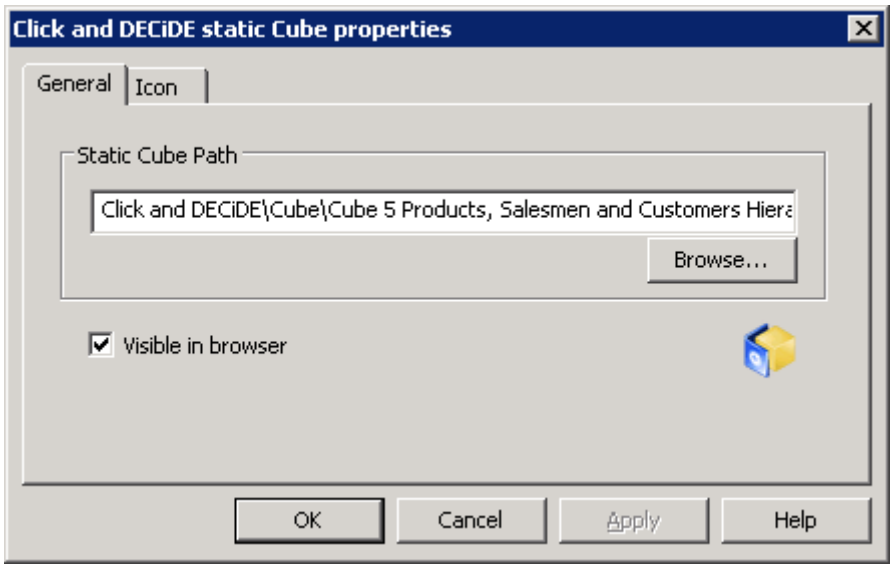
12. Double-click the new static cube or click the icon to open the **Click and DECiDE static Cube Properties** property sheet.
13. Click the **Browse...** button.
14. Select the **Cube 5 Products, Salesmen and Customers Hierarchies.cndc** file located in the C:\Program Files\Click and DECiDE\BAI\web\publication\Click and DECiDE\Cube directory.



15. Select the **Visible in browser** check box if you want the static cube to be visible in the Web Portal. Clear the check box if you want to hide the static cube in the Web Portal.
16. Click **OK**.

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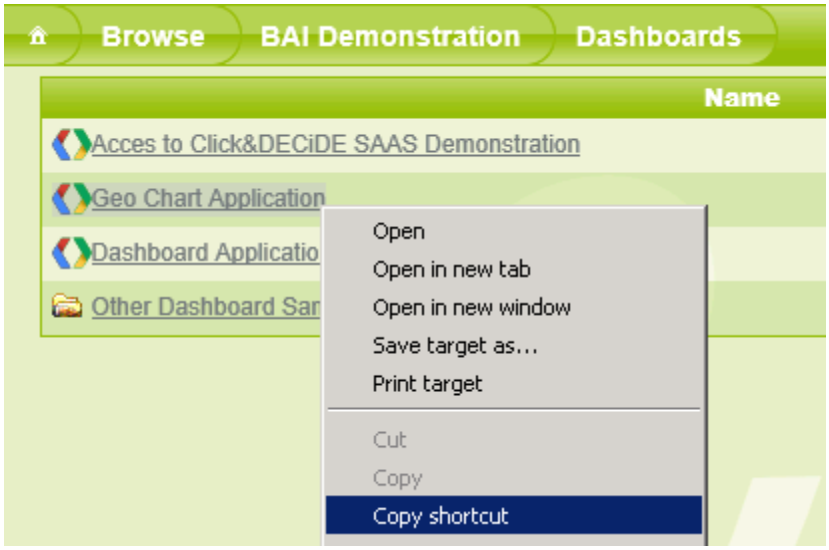
7.4.8. Inserting a Click&DECiDE Dashboard

To insert a Click&DECiDE Google Chart Dashboard, please follow the steps below.

1. Select the root branch.
2. Click the **New Folder** icon to insert a new folder.
3. Right-click the new folder.
4. Select Rename and rename the folder with the name you want, for example **Dashboard**.
5. Select the new folder, in this example the **Dashboard** folder.
6. Click the icon to add an URL.

7. Go to the Web Portal and select in the BAI Demonstration menu, the Dashboard branch, then the Geo Chart Application sample:



8. Make a right mouse click and select **Copy shortcut**.
9. Rename the default name **Dashboard** with the name you want, for example **USA Geo Chart** in this example.

10. Double-click the new **USA Geo Chart** branch and paste the URL into the box: (removing the http://servername):

    /DVWEB/Menus/Display.aspx?__ma=BAI+Demonstration&__mi=2558&__rp=Dashboard+Samples%2fSales+by+Area.xgc

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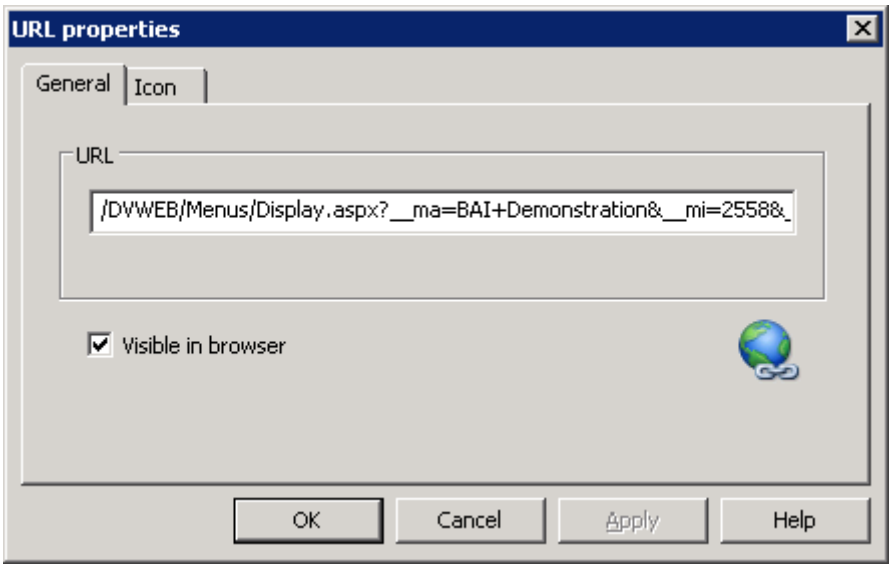
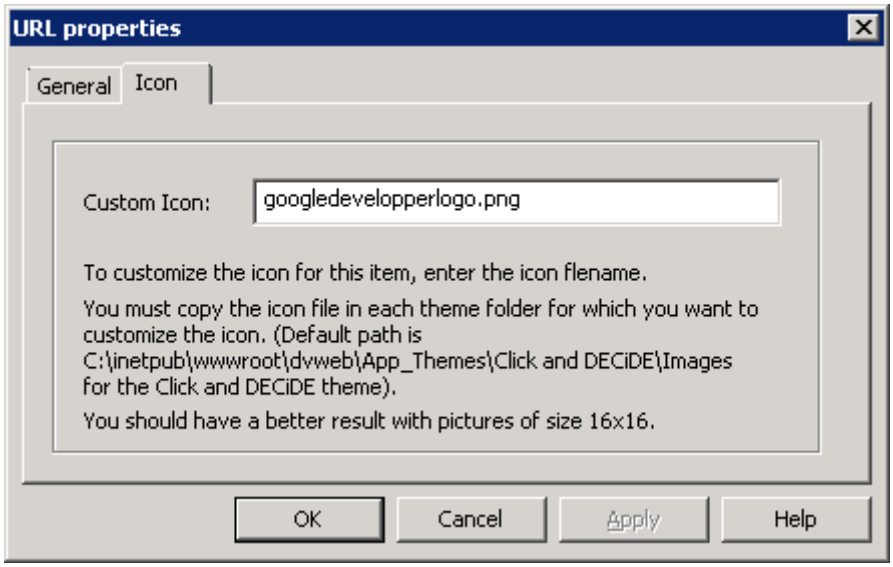


11. Optional: click the Icon Tab and enter a picture name such as “googledevelopperlogo.png”


URL properties
General
Icon
Custom Icon:
googledevelopperlogo.png
To customize the icon for this item, enter the icon filename.
You must copy the icon file in each theme folder for which you want to customize the icon. (Default path is C:\inetpub\wwwroot\dvweb\App_Themes\Click and DECiDE\Images for the Click and DECiDE theme).
You should have a better result with pictures of size 16x16.
OK
Cancel
Apply
Help

The picture is located into the Server in the directory C:\inetpub\wwwroot\dvweb\App_Themes\Click and DECiDE\Images. You also can select another picture in this directory. (No path has been to enter, only the picture name).

12. Click **OK** to validate.

7.4.9. Inserting a Link to a File

To insert a link to a file, please follow the steps below.

1. Select the root folder.
2. Click the **New Folder** icon to insert a new folder.
3. Right-click the new folder.
4. Select **Rename**.
5. Rename the folder with the name you want, for example **Other**.
6. Select the new folder, in this example the **Other** folder.

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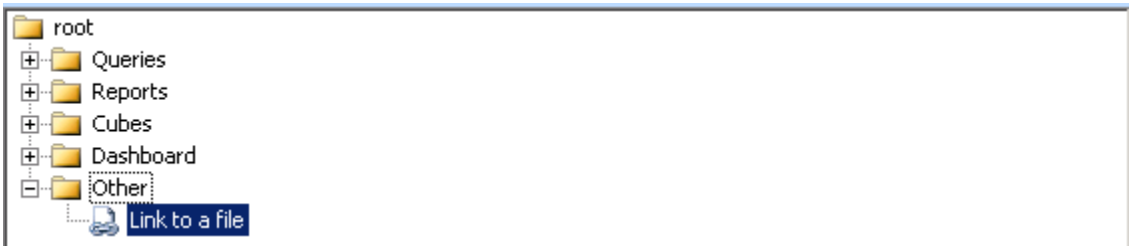
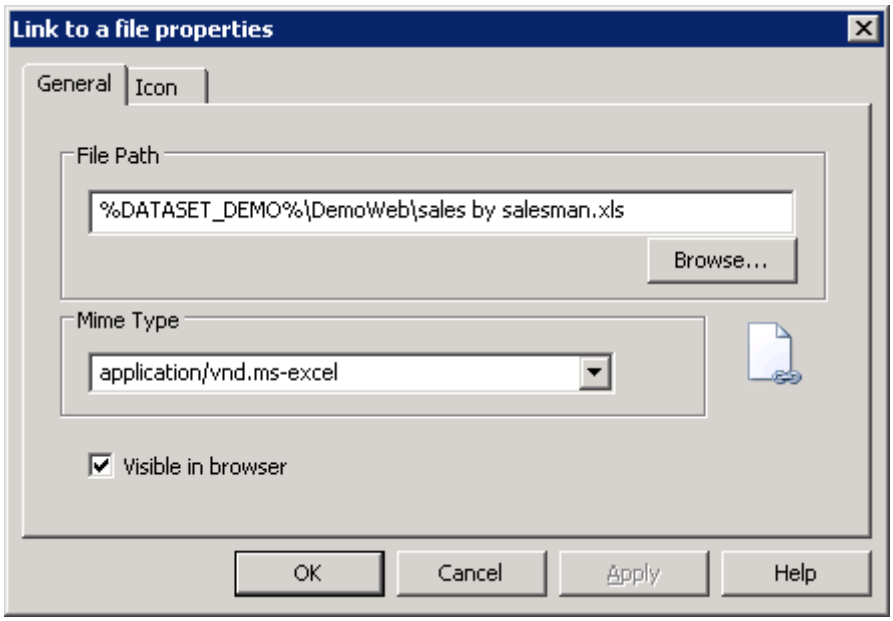
7. Click the **Link to File** icon to add a link to a file.



8. Right-click **Link to a file**.
9. Select **Rename**.
10. Rename **Link to a file** with the name you want, for example **Sales by Salesman**.

11. Double-click the new **Sales by Salesman** branch or click the icon to open the **Link to a file properties** property sheet.
12. Click **Browse...**.
13. Select the **Sales by salesman.xls** file located in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.



14. Note that the corresponding **Mime Type** is automatically displayed, if the file is recognized.
15. Click the **Mime Type** arrow to expand the drop-down list.
16. Click **OK**.

7.4.10. Inserting a URL

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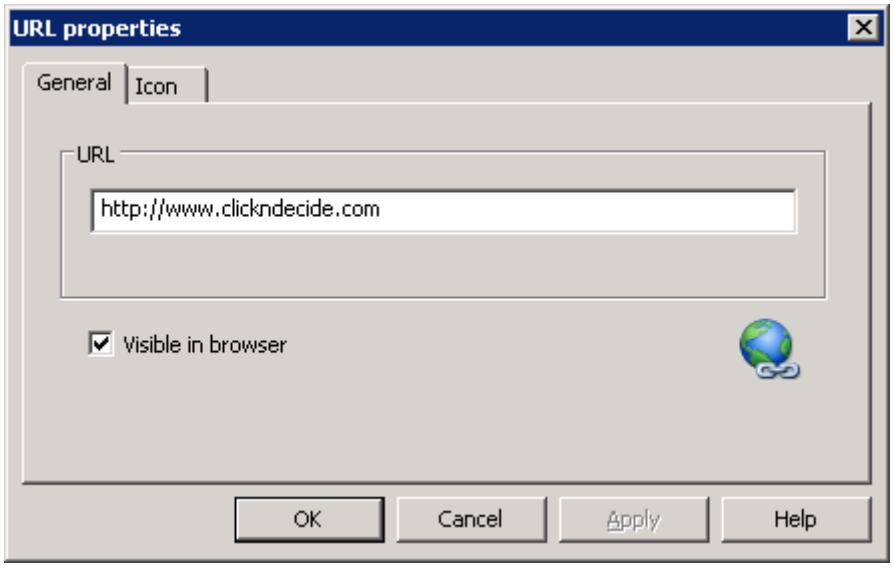
To insert a URL, please follow the steps below. The URL could launch a query, a report, a cube, a Dashboard as describe before, a Web Site etc.

1. Select the **Other** folder.
2. Click the **Hyperlink** icon to add a link to an URL.

3. Right-click **URL**.
4. Select **Rename**.
5. Rename the default name **URL** with the name you want, for example **Click&DECiDE Web Site**.

6. Double-click the new URL, in this example **Click&DECiDE Web Site** or click the icon to display the URL Properties property sheet.
7. Enter the URL you need, for example **http://www.clickndecide.com**.



8. Click **OK**.

7.4.11. Inserting a link to Click&DECiDE Builder

If your license certificate located in the Server machine authorizes you to use Clik&DECiDE Builder via the Web Portal, using a secured data source specified by your Administrator of the Administration Manager, you

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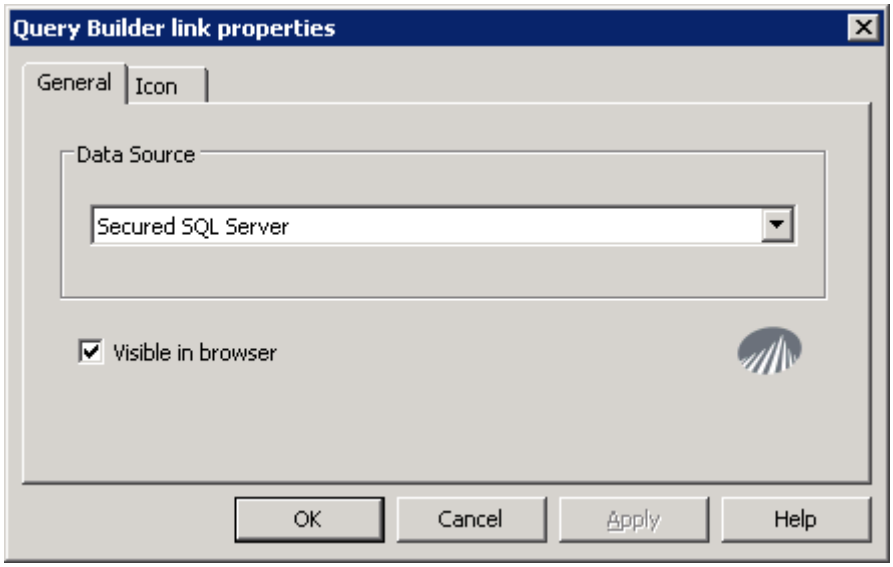
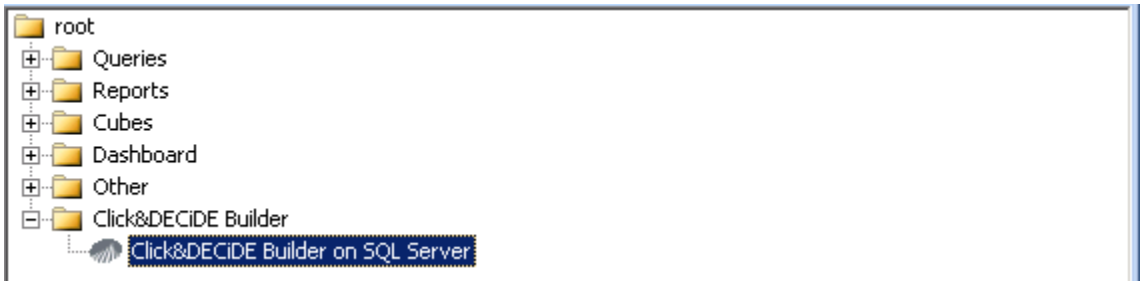
can add a link to use this application for those authorized users. To insert a link to Click&DECiDE Builder in the Web Portal, please follow the steps below.

1. Select the root folder.
2. Click the **New Folder** icon to insert a new folder
3. Right-click the new folder.
4. Select Rename.
5. Rename the new folder with the name you want, for example **Click&DECiDE Builder**.
6. Select the new folder, in this example the Click&DECiDE Builder folder.
7. Click the **Insert Dynamic Link to Click&DECiDE Builder** icon, to add a link to start Click&DECiDE Builder using a predefined secured data source, such as the one installed with Click&DECiDE BAI.
8. Right-click the default name **Builder Link**.
9. Select **Rename**.
10. Rename the **Builder Link** with the name you want, for example **Click&DECiDE Builder on SQL Server**.
11. Double-click the new Builder Link or click the icon to open the **Query Builder Link properties** property sheet.



12. Select the required Data Source from the **Data Source** drop-down list
    Note: the selected data source must be a secured data source in the Administration Manager.
13. Click **OK**.



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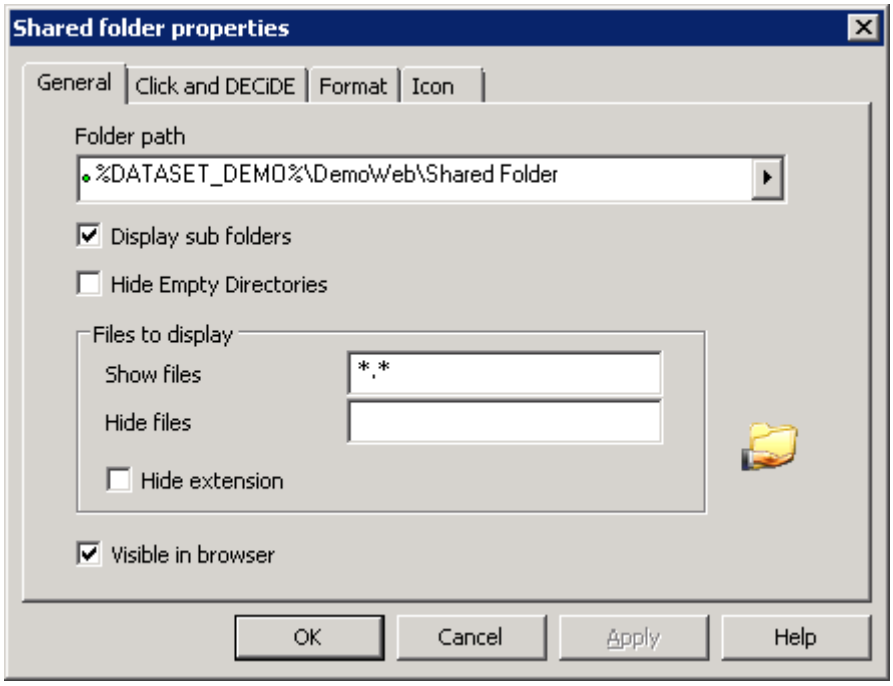
Note: when the authorized end user clicks this link for the first time, they will be prompted to install Click&DECiDE Builder.

7.4.12. Inserting a Shared Folder

To insert a shared folder, please follow the steps below.

1. Select the **root** folder.
2. Click the **Insert Shared Folder** icon.

3. Right-click the new **Shared Folder**.
4. Select **Rename**.
5. Rename the default name **Shared Folder** with the name you want, for example **My Shared Folder**.
6. Double-click the new **Shared Folder**, in this example **My Shared Folder** or click the icon to open the **Shared Folder Properties** property sheet.
7. Select the **General** tab.



8. Click **Browse**.
9. Select the **Folder Path** corresponding to the directory you want to be used as a Shared Folder, example C:\Program Files\Click and DECiDE\BAI\DemoWeb\Shared Folder or using the Environment variable %DATASET_DEMO%\DemoWeb\Shared Folder.
10. Click **Display sub folders** if you want to see all the sub-folders.
11. Click **Hide Empty Directories** if you want to hide them.

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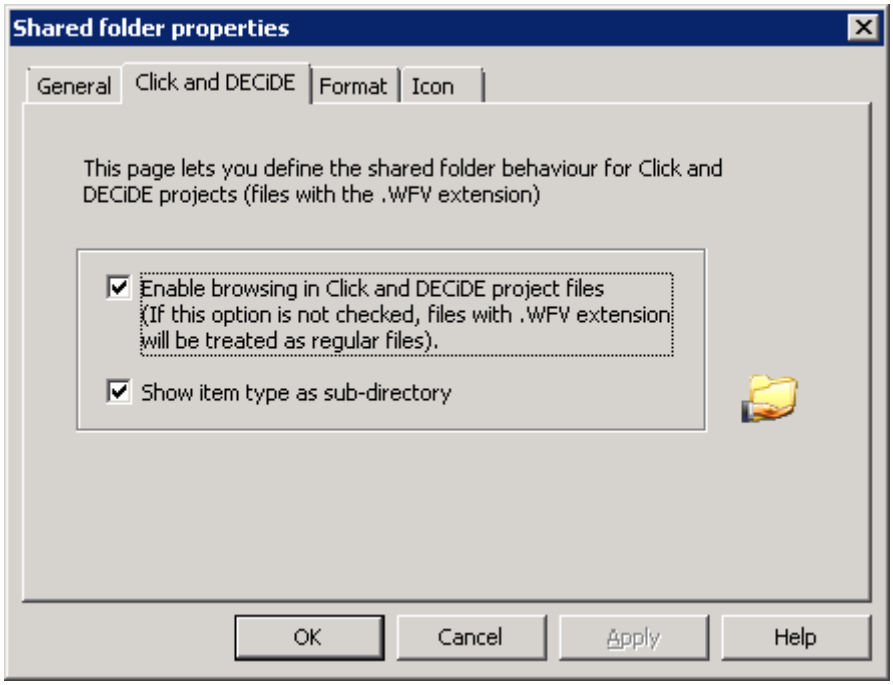
12. Note that by default **Show files** will show all files including Click&DECiDE Builder project files. To limit the files shown, you can enter specific files and/or items beginning with a string. For example:

    Show files = B*;W* will only display directories, files or Click&DECiDE Builder project files beginning with a B or W. Show files = *.wfv;*.pdf will display files with the wfv or pdf extensions. (Use a semicolon as separator). Note that ***.** will display directories names.

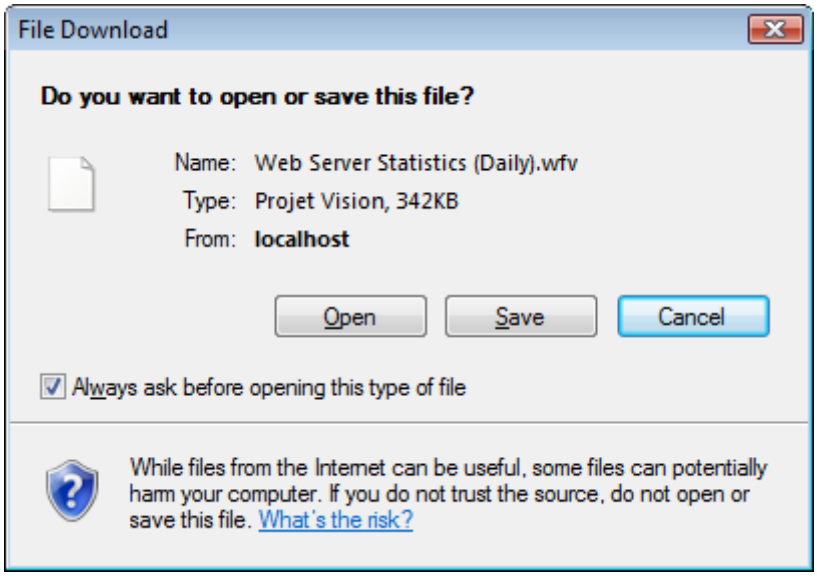
    Hide files = *.lst;*.cub will hide files with the lst or cub extensions. (Use a semicolon as separator). **Note:** queries, reports and cubes can be hidden directly from a Click&DECiDE Builder project file using the **Visible** property set to **No** for each required item.

    Hide extension: select this check box if you want to hide all file extensions.

13. Select the **Click and DECiDE** tab:


Shared folder properties
General
Click and DECiDE
Format
Icon
This page lets you define the shared folder behaviour for Click and DECiDE projects (files with the .WFV extension)
Enable browsing in Click and DECiDE project files (If this option is not checked, files with .WFV extension will be treated as regular files).
Show item type as sub-directory
OK
Cancel
Apply
Help

14. Select the **Enable browsing in Click and DECiDE project files** check box, if you want to display the content of each visible project file in the shared folder. If you clear this check box the project file will behave as a standard file and the user will get the message about the file download.


File Download
Do you want to open or save this file?
Name: Web Server Statistics (Daily).wfv
Type: Projet Vision, 342KB
From: localhost
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

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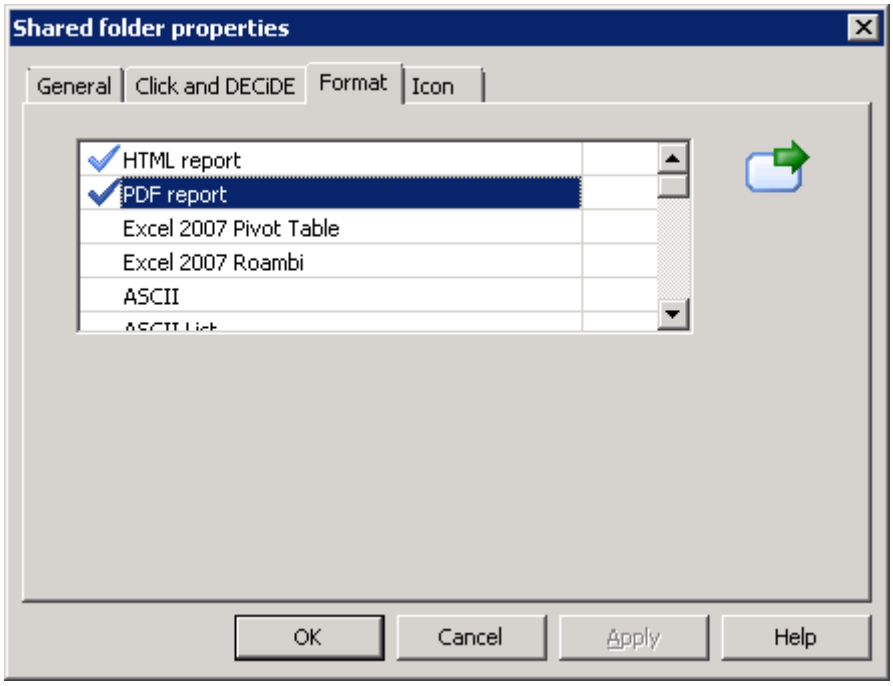
If the **Enable browsing in Click and DECiDE project files** check box is selected, then you can see all the queries, reports and cubes in the same branch.

15. Enable the **Show Item Type as Subdirectory** check box if you want to see three distinct branches to separate queries, reports and cubes.
16. Select the **Format** tab.
17. Select the output format you want to authorize for all project items (queries, reports and cubes).

    Note: refer to the Output Format section later in this document.



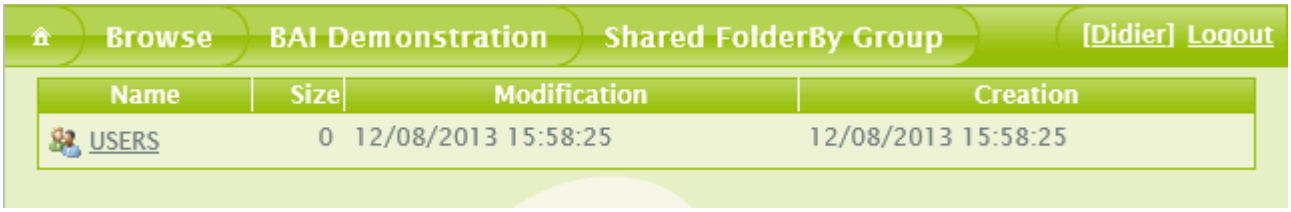
18. Click **OK**.

7.4.13. Inserting a Shared Folder by Group

Under Windows Authentication, you can insert a Shared Folder that will create automatically a sub-directory for each recognized Windows User Groups, such as Administrators, Users, Domains Users, etc.

To do so, create a shared folder as describe in the previous paragraph but change the target path adding **<GROUP> (in Uppercase characters)** in the path:
%DATASET_DEMO%\DemoWeb\Shared Folder**<GROUP>**

If you are a User belonging to the User Group whose name in Windows is “Users”, then, when accessing this Shared Folder, you automatically will see the list of the Group(s) you belong to:



And when you click on one of these Groups, you see the content authorized of this Group:

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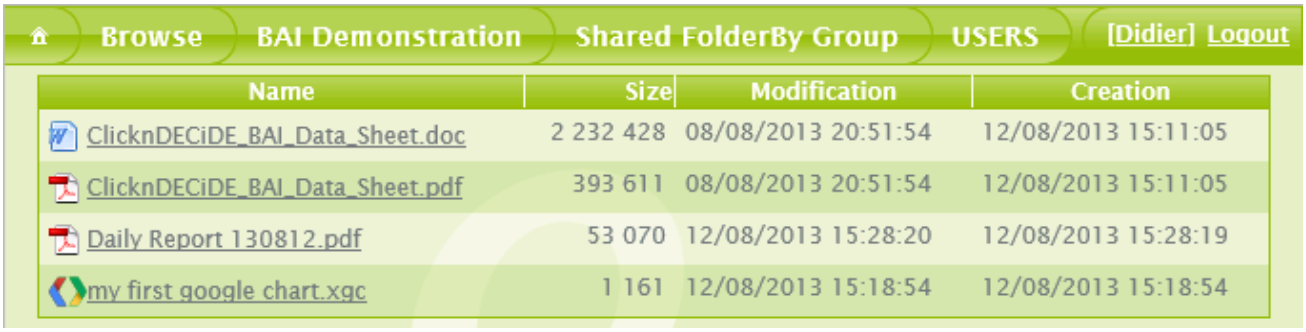
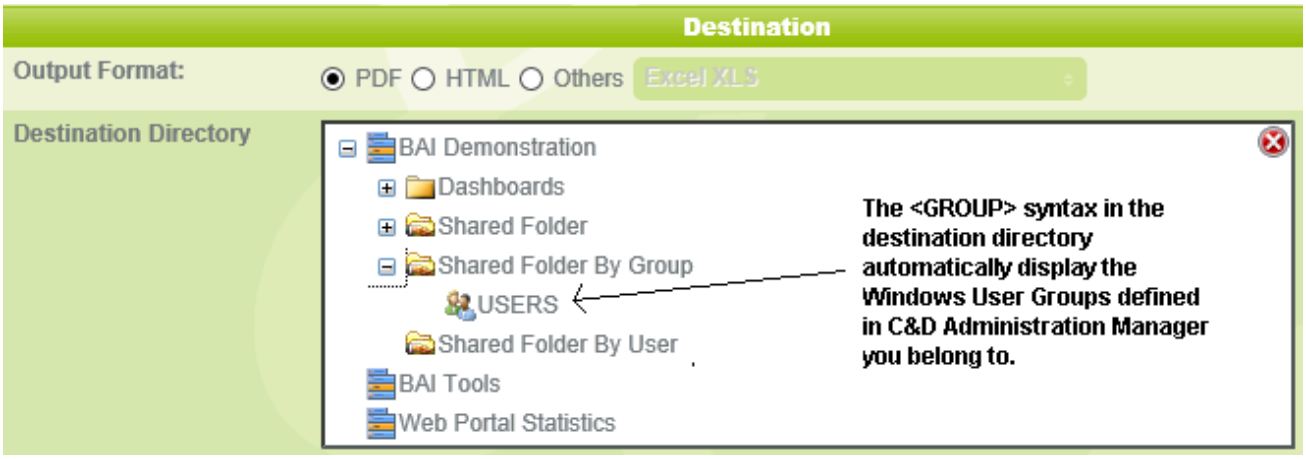


Note: this <GROUP> also will be used by the “File” > “Open” and the “File” > “Save As” commands from the “Create” main command in the Web Portal, used to manage the Google Charts Applications. (Refer to the Google Chart User Manual for more information).

Note also that this <GROUP> can be used when defining a Task in the Destination Directory Path:



(Refer to the Web Portal User Manual for more information).

7.4.14. Inserting a Shared Folder by User

Under Windows Authentication, you can insert a Shared Folder that will create automatically a sub-directory for each recognized Windows User, such as Administrator, Georges, Mary, Alicia, John etc.

To do so, create a shared folder as describe in the previous paragraph but change the target path adding **<USER> (in Uppercase characters)** in the path:
%DATASET_DEMO%\DemoWeb\Shared Folder**<USER>**

If you are a Windows User then, when accessing this Shared Folder, you automatically will only see the content of the Subdirectory corresponding to your Name (User-ID): For example the current connected User is “Didier”:

And here, with the Same Destination Directory “Shared Folder by User”, the Administrator User will see the content of the “Administrator” Subdirectory:

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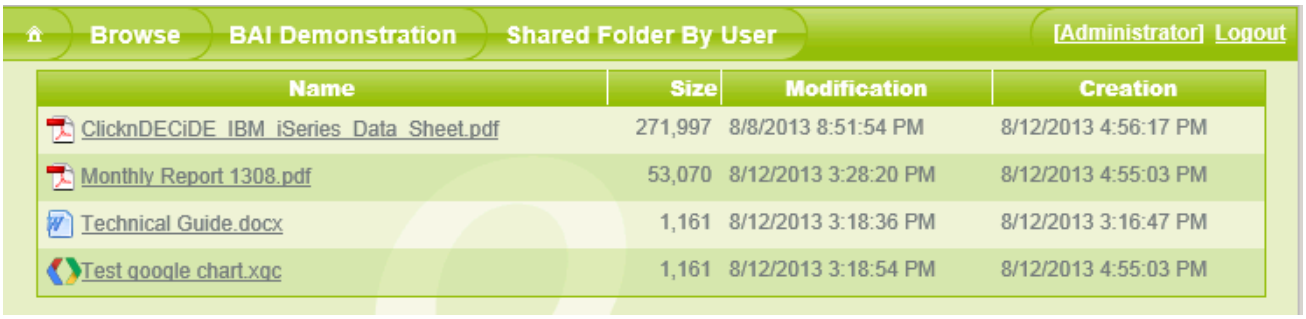

Note: this <USER> also will be used by the “File” > “Open” and the “File” > “Save As” commands from the “Create” main command in the Web Portal, used to manage the Google Charts Applications. (Refer to the Google Chart User Manual for more information).

Note also that this <USER> can be used when defining a Task in the Destination Directory Path:

(Refer to the Web Portal User Manual for more information).

7.5. Saving and applying a Menu

To save and apply a menu, please follow the steps below.

1. Select **File> Save As** or **File> Save** or click the **Save** icon to save your menu with the file extension *.wmu.

   Note: each time you save a menu, it is not necessary to update the security via the Click&DECiDE Administration Manager as this menu file is a separate file. You only need to update the security if you modify the Menu list or Menu assigned to one or several User Groups.

2. Enter the menu name as appropriate, for example **My Menu.wmu**:

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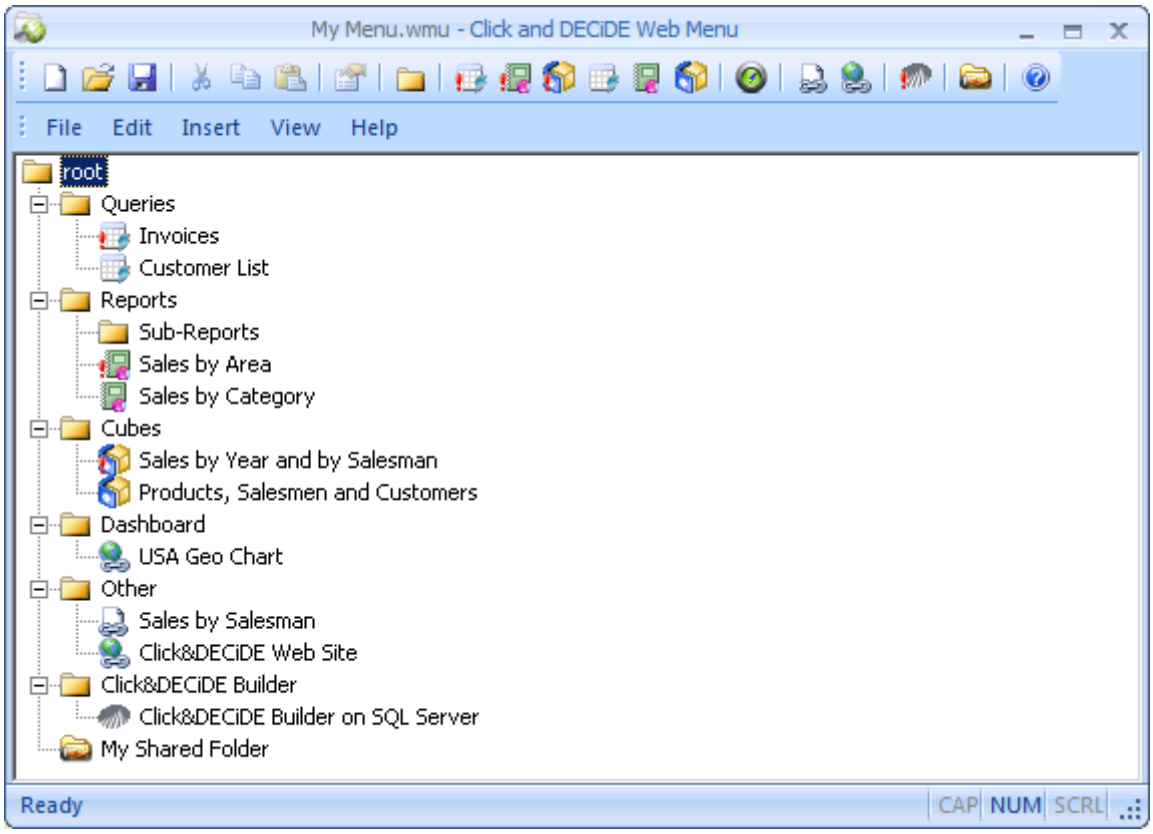
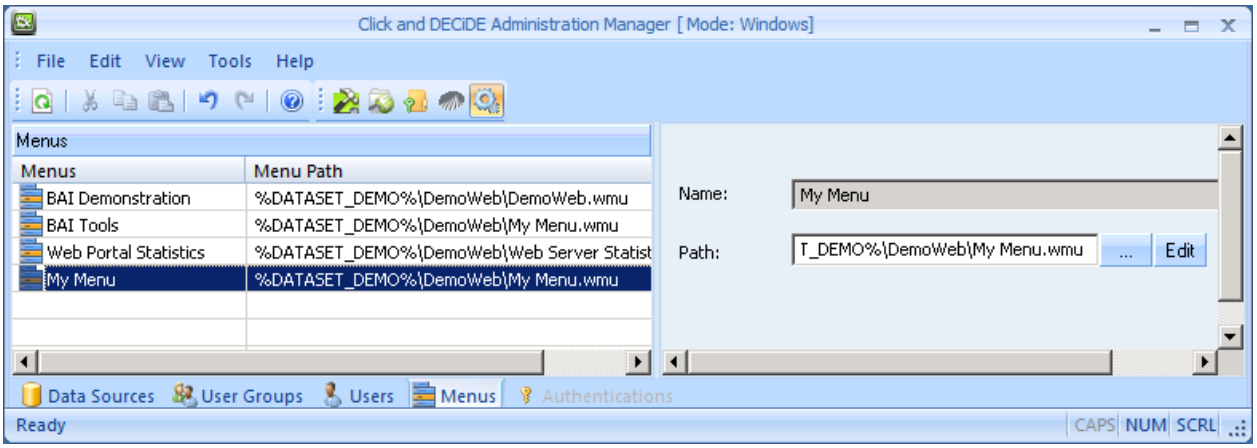


3. Go back to **Administration Manager.**
4. Select the **Menu** tab.
5. Add a new menu in the left **Menus** pane.
6. Change the name to the name you want, in this example **My Menu** in the right pane.
7. Click **…** browse to search for your menu, in this example the menu saved as My Menu.wmu.



8. Click the new menu you've just created in the left **Menus** pane, in this example the **My Menu** row to see the Menu **Path**.
9. Modify the path with an environment variable in the **Path** text box in the right pane.
10. Select the **User Group** tab:

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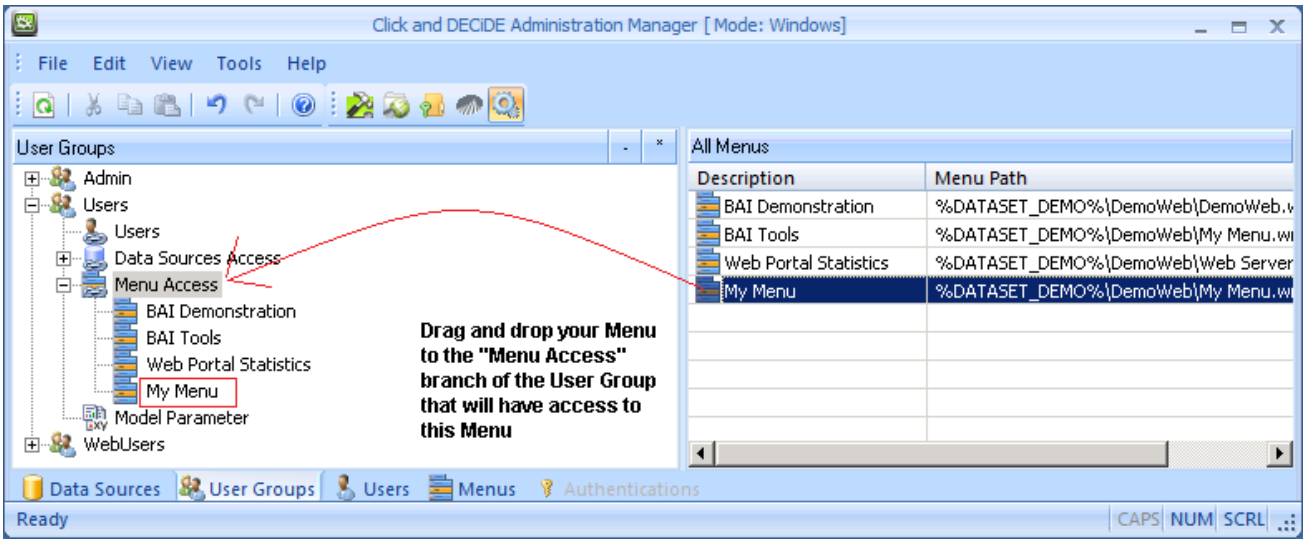

11. Move the menu you created from the right **All Menus** pane to the **Menu Access** branch in the left **User Groups** pane using a drag-and-drop operation. In this example we are going to move the **My Menu** menu.
12. Click **File> Update Database Security** or click the **Update** icon.
13. Launch the Web Portal, select **Start> All Programs> Click and DECiDE> Web Portal**.
14. Disconnect and reconnect if you need to reload the menu list in the Web Portal. The new menu, in this example **My Menu** menu will appear if you are a user belonging to the corresponding User Group.

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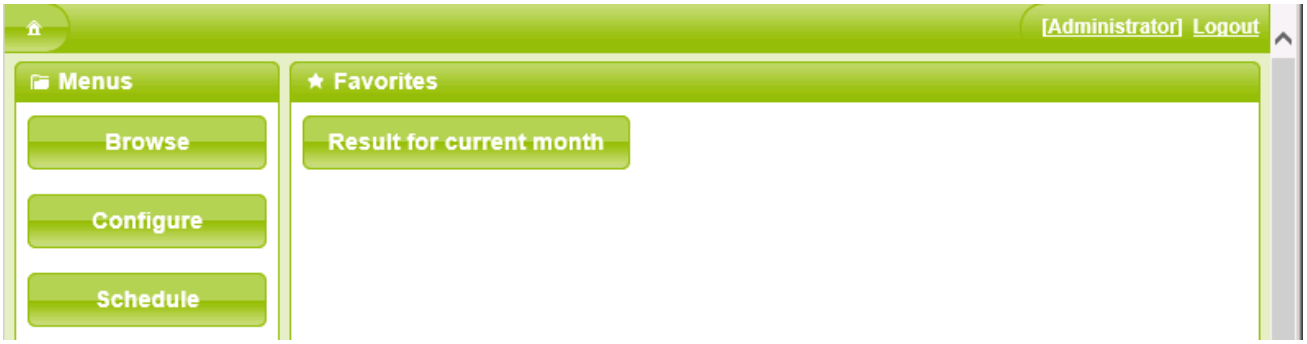
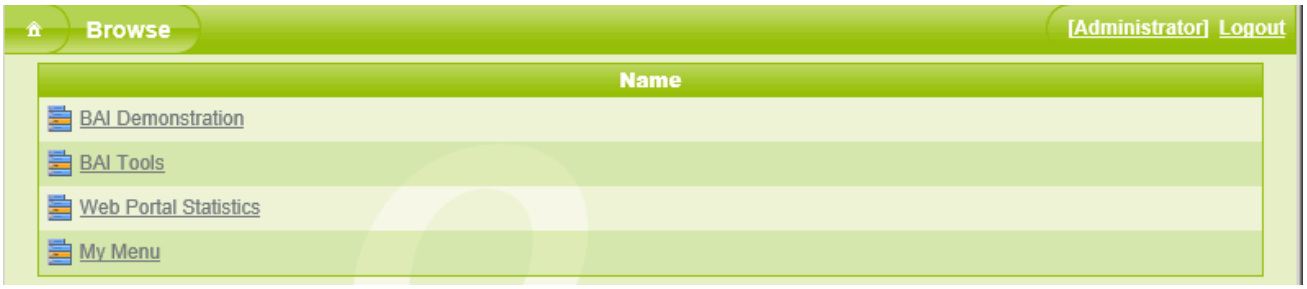
Or, if you start the Web Portal with http://servername/dvweb/home.aspx or hide the Left Pane you will see the Web Portal as follow:

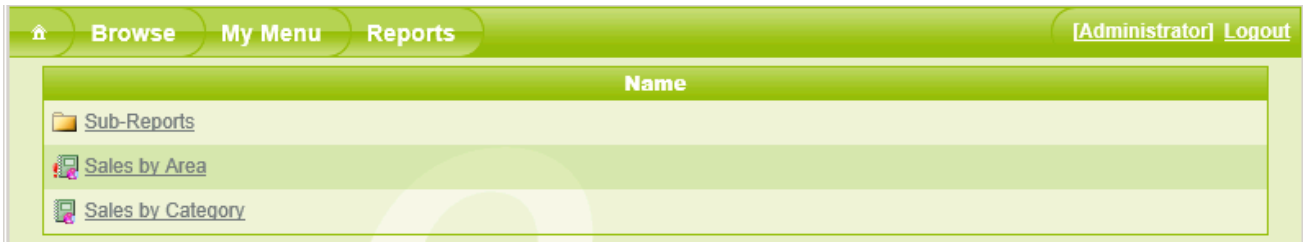


And if you click the **Browse** button, the menus will appear as follow:

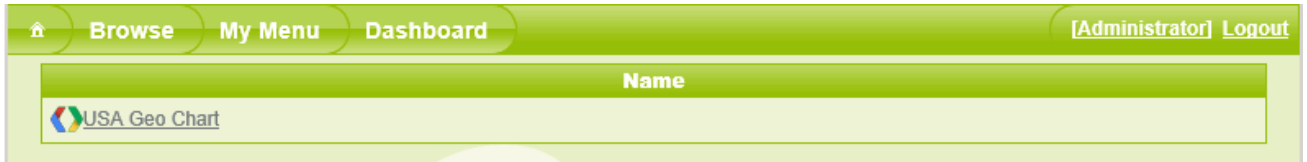


15. Click the My Menu branch to display the Menu Content:

16. Click any branch to display the Content:



or



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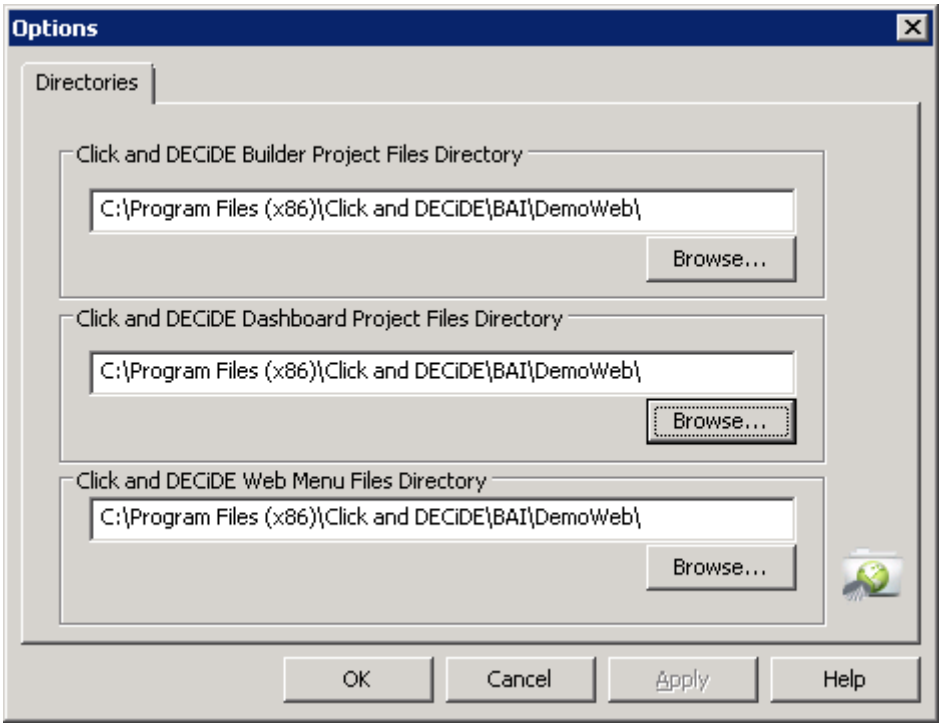
Just click the "**My Menu**" in the main bar to come back to the Menu List.

7.6. Working with Advanced Menu Functions

7.6.1. Working with the Options Dialog Box

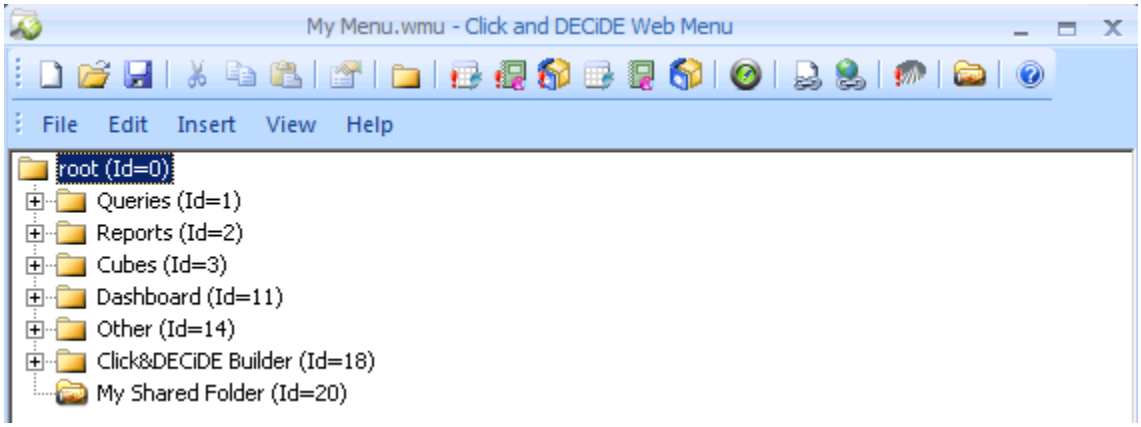
When you select **View> Options**, the **Options** dialog box appears. This dialog box allows you to define general options for the Menu program for the work directories for the following files:

- Click&DECiDE Builder project files (*.wfv)
- Click&DECiDE Dashboard project files (*.wfd). (Note that this Dashboard does not concern Google Chart Dashboard but the old Dashboard Application called EBIS in old product versions.)
- Click&DECiDE Menu files (*.wmu)



7.6.2. Using the Show ID Command

Select **View> Show ID** to display the unique ID given to each Menu Item. Each branch will automatically be attributed a menu ID.



Each sub-branch or final item is also attributed a specific menu ID.

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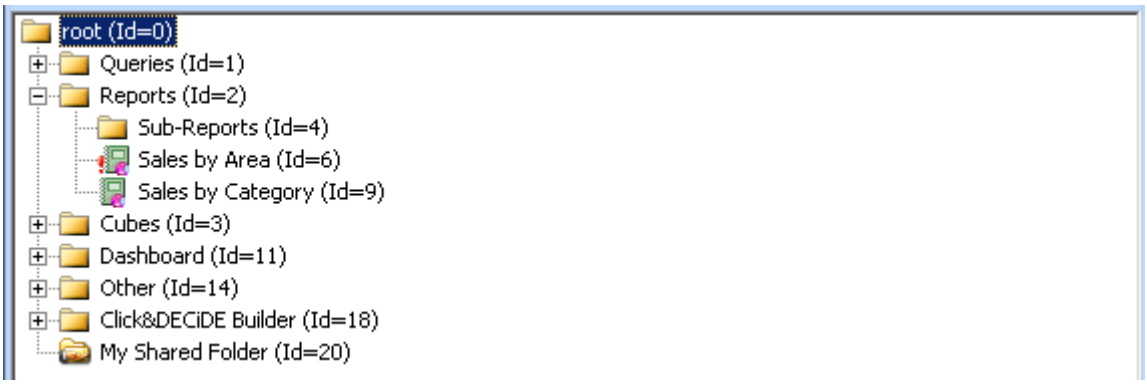
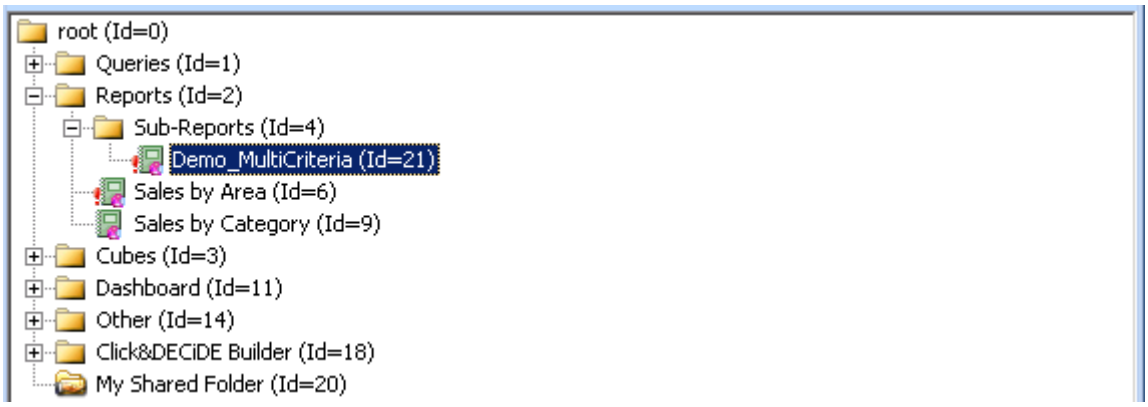


7.6.3. Building a Report URL for a Drill-Down to Another Report

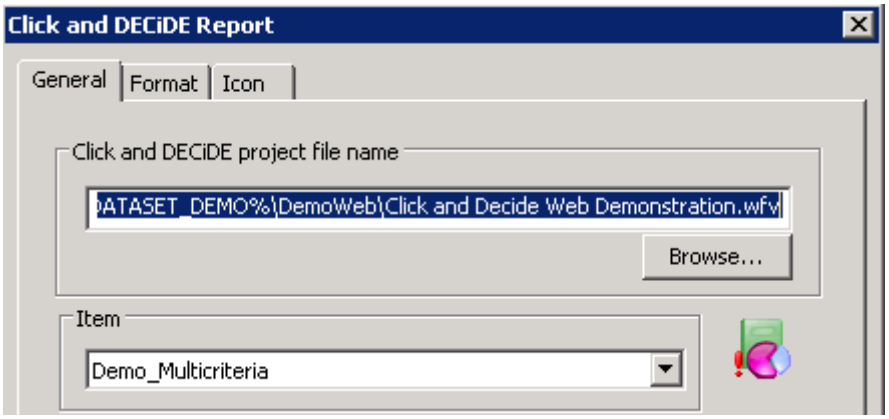
If you want to jump from one report to another, for example if you want to create drill-downs in your reports, then you will need to use URLs. The IDs we saw in the above section are used in the URL that you create for drill-down links. In this example we are going to create a URL to enable use to jump from the Sales by Area report (Id=9 in the above menu) to another report, located in the Sub-Reports branch.

Exercise 1:

1. Add the **Demo Multicriteria** report into the **Sub-Reports** branch.
2. Note the following menu with the Menu Id = 21 appear for this report.



3. Specify the report to be run and the output format you need (PDF for example)



4. Save this Menu
5. Launch the Web Portal.
6. Display this branch via the Web Portal:

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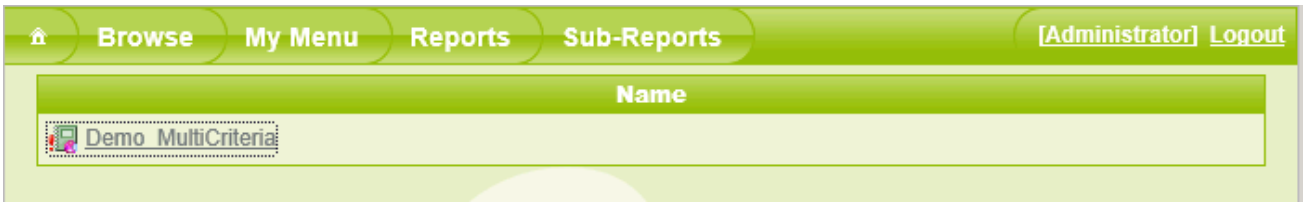
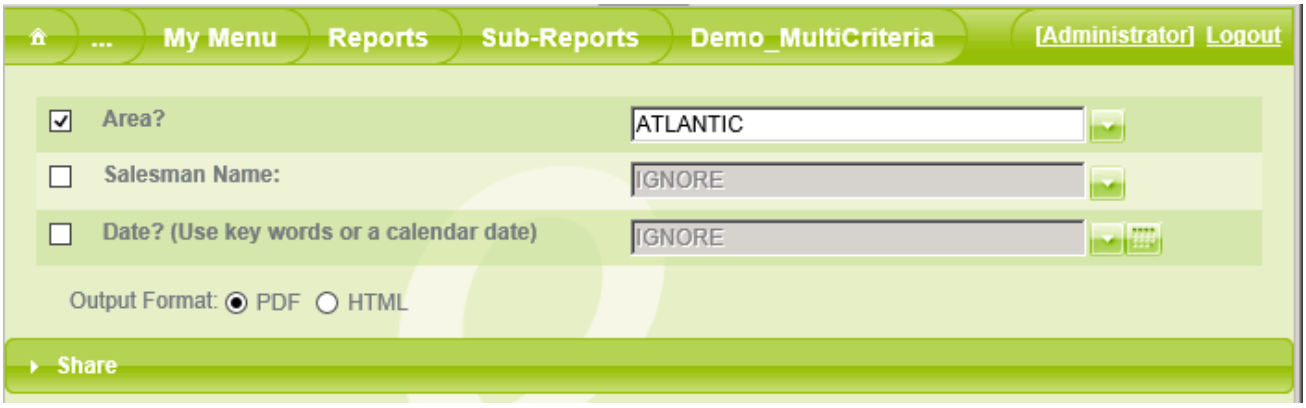


7. Click the **demo_multicriteria** sub-report.
8. Select any area for the first criteria.
9. Leave **IGNORE** (for all values) for the **Salesman** criteria.
10. Leave **IGNORE** for the **Date** criteria (the default values will be used later):



11. Click the **Share** button.
12. Copy the **URL** near the

13. Paste the content into any editor, the URL will be as follows:

http://localhost/dvweb/Menus/ShowParameters.aspx?__ma=My+Menu&__mi=21&AREA_PARAM=ATLANTIC&__f=PDF&__e=0

Replace **ShowParameters.aspx** with **Display.aspx**

http://localhost/dvweb/Menus/Display.aspx?__ma=My+Menu&__mi=21&AREA_PARAM=ATLANTIC&__f=PDF&__e=0

14. Open the **demo_multicriteria** query using Click&DECiDE Builder.
15. Select **Query> Parameters** to open the **Query Parameters** dialog box.
16. Select the **AREA_PARAM** parameter.
17. Click the **Copy** icon.

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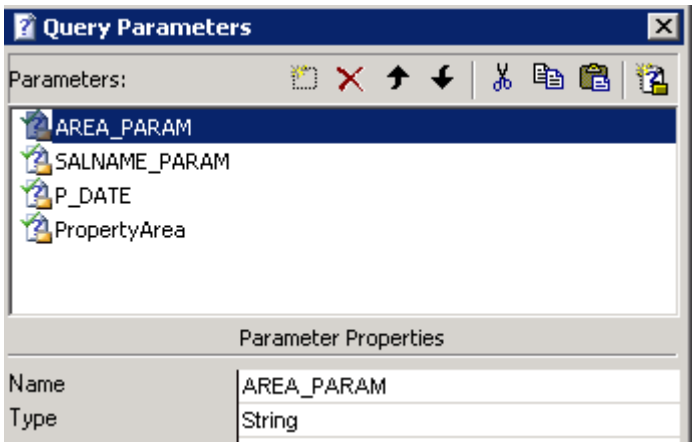
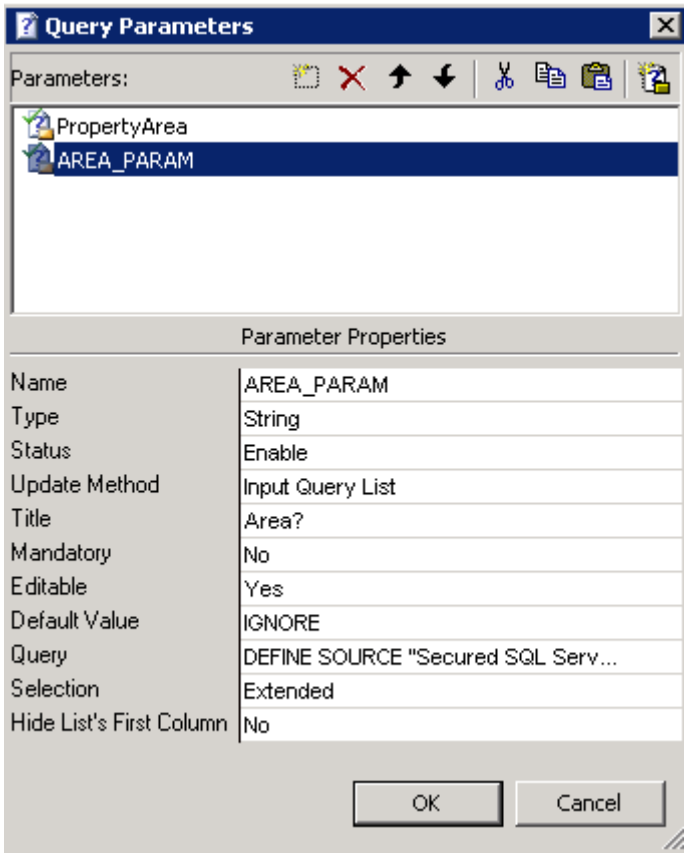


18. Close the query.
19. Open the **Sales by area and distributor** query that feeds the **Sales by Area** report.
20. Select **Query> Parameters** to open the **Query Parameters** dialog box.
21. Paste the parameter previously copied with the icon.
22. Click **OK**.



23. Click the leftmost column of the AREA field. The **Criteria** dialog box appears.
24. Click **New** to add new criteria on that field.
25. Enter the parameter name using the **Expression** tab.

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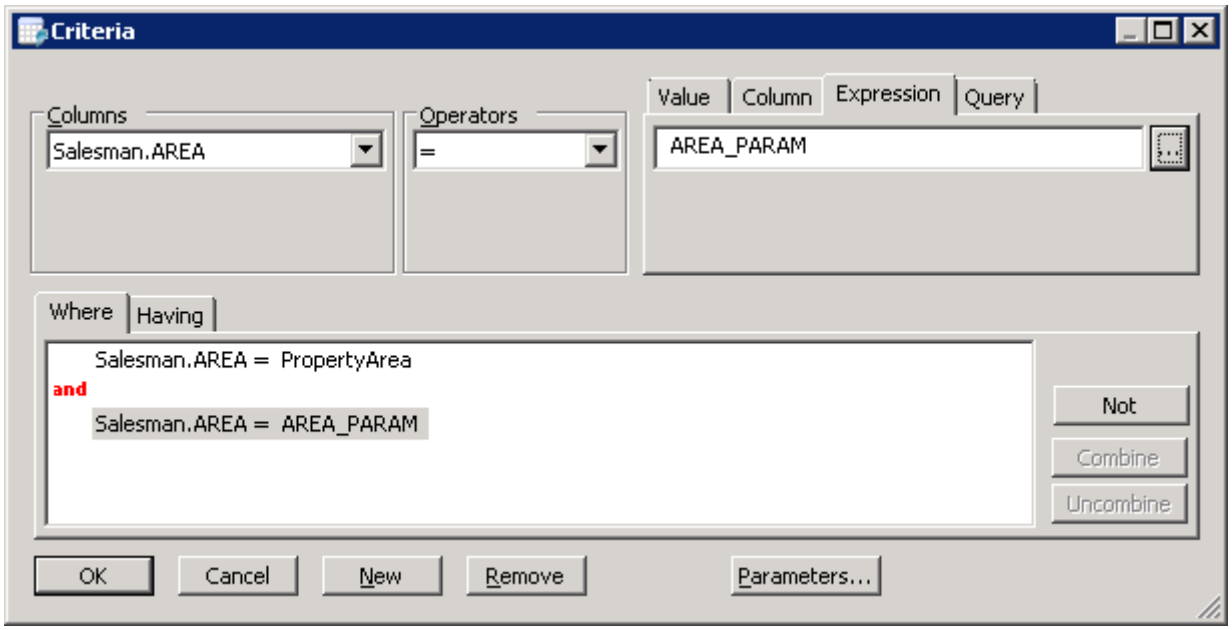
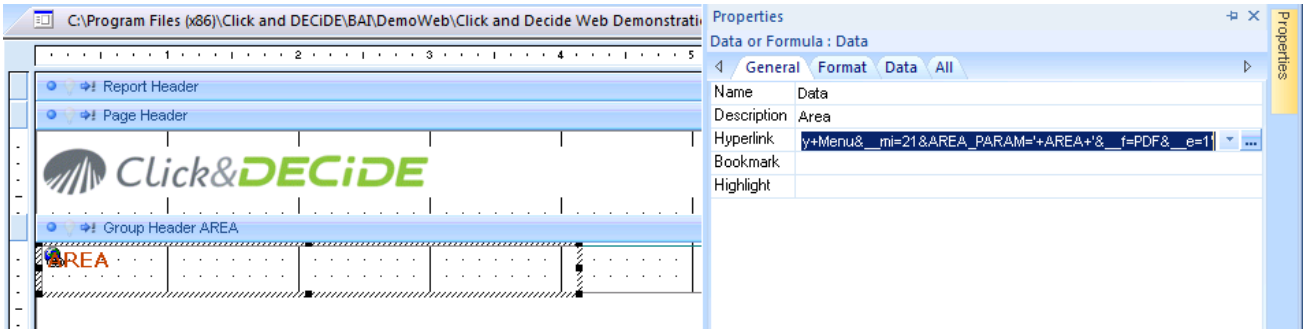


26. Click **OK**.
27. Close and save the **Sales by area and distributor** query.
28. Open the **Sales by Area** report (based on this query).
29. Select the **AREA** field in the Group Header AREA.
30. Select the **General** tab in the **Properties** pod.
31. Enter the following URL in the **Hyperlink** text box.

='/dvweb/Menus/Display.aspx?__ma=My+Menu&__mi=21&AREA_PARAM='+AREA+'&__f=PDF&__e=1'

Note: using the copied URL we have replaced the beginning before /dvweb with a single quote, then replaced the AREA_PARAM =ATLANTIC with '…AREA_PARAM='+AREA+'…' and _e=0 with _e=1.



ShowParameters.aspx will display the parameters and output formats.

Display.aspx will not display the parameters and output formats.

_ma=My+Menu is the Menu name.

_mi=21 is the Menu ID for the called report.

'…AREA_PARAM='+AREA+'…' means that the parameter AREA_PARAM will take the content of the AREA field

_e=1 means that the execution of the called report will be performed immediately without offering the Cancel button.

_e=0 means that the execution of the called report will be performed showing the Run and Cancel buttons.

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_f=PDF: means that the output format for the called report will be Acrobat Reader, it could be modified to **_f=HTML** for example.

The URL can contain the following items:

Long Syntax	Short Syntax	Description
Menu Items		
__mnu_alias	__ma	Menu name Example: __ma=My+Menu
__mnu_itemid	__mi	Menu ID (number), example: &__mi=28
Shared Folder Items		
__relative_path	__rp	Relative path to a Builder Project inside a Shared Folder Example: &__rp=Click+and+Decide+Web+Demonstration.wfv
__type	__t	File type in a Shared Folder Example: &__t=vision for a Builder Project file. If this parameter is missing the Builder Project File will be considered as a standard file a File Download dialog box will be displayed.
__item_type	__it	Project Item Type in a Shared Folder (1=query, 2=report, 4=cube) Example: &__it=2
__item_name	__in	Project Item Name in a Shared Folder Example: &__in=Demo_Multicriteria
Parameters		
<Parameter Name>		&paramatername=Value& if the value fixed '…&parametername='+ ColumnName+'…' if the value is returned by an alphanumeric query column '…&parametername='+ Str(ColumnName)+'…' if the value is returned by a numeric query column '…&parametername='+ FormatDateTime('yyyy/mm/dd',ColumnName)+'…' if the value is returned by a Date or DateTime query column '…&parametername='+ ParamAsString('ParamDateName',[x])+'…' if the value is returned by a Date or DateTime Parameter. x is optional and can take values from 0 to 3. (Refer to Click&DECiDE Report Manual).
Output Format		
__format	__f	Output format (PDF, HTML or a C&D Builder output format)
Execution		
__exec	__e	0 = display parameter list before to be run / 1 = run now.

32. Save the **Sales by Area** report.
33. Close the report.
34. Go back to the Menu.
35. Clear the **Visible in browser** check box to ensure the sub-report demo multicriteria is not visible in the Web Portal. (Note that you also can Hide the full branch Sub-Report).

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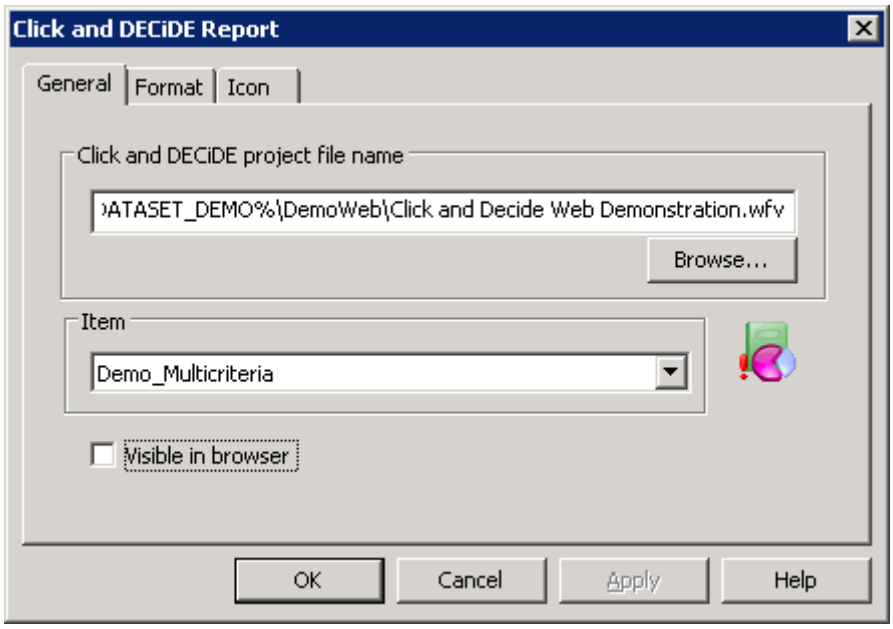
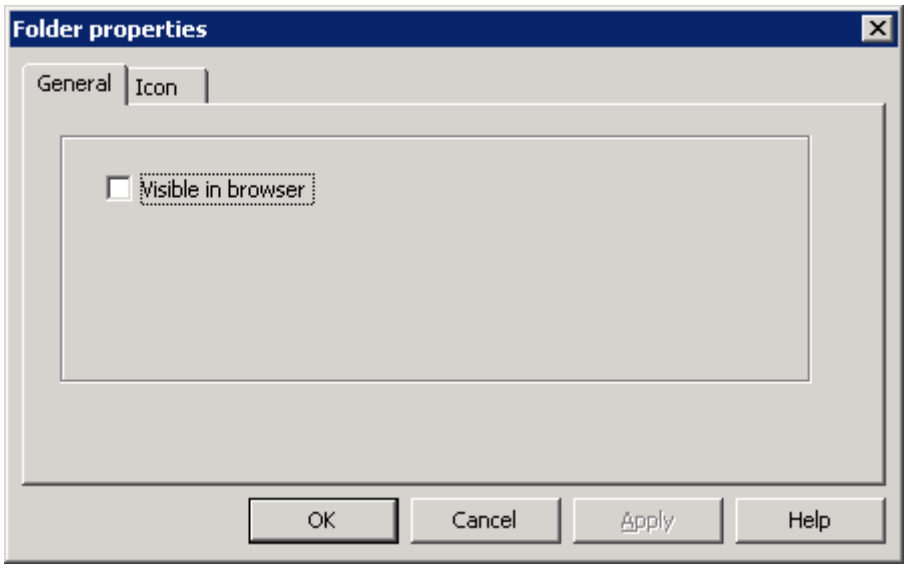


36. Click **OK**.
37. Or just Clear the **Visible in browser** option to hide the **Sub-Reports** branch.



38. Click **File> Save** to save the menu.
39. Go back to the Web Portal.
40. Disconnect and Reconnect to refresh the Menu
41. Note the Sub-Reports branch is now hidden.

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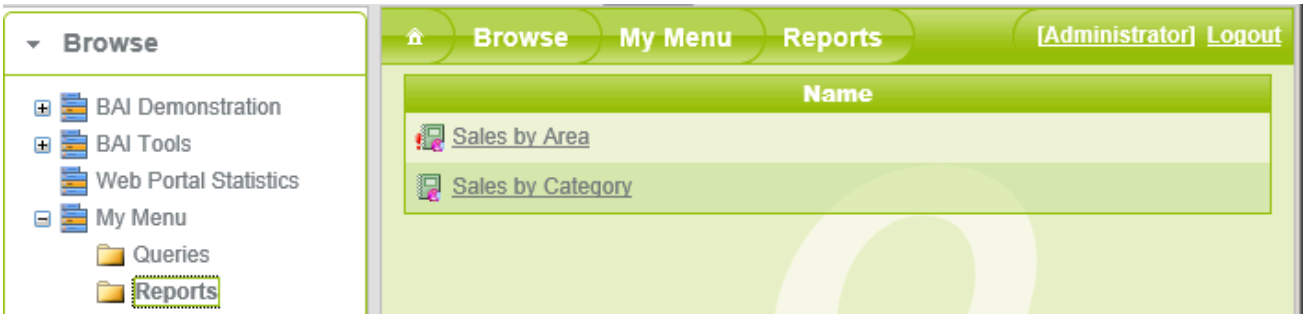
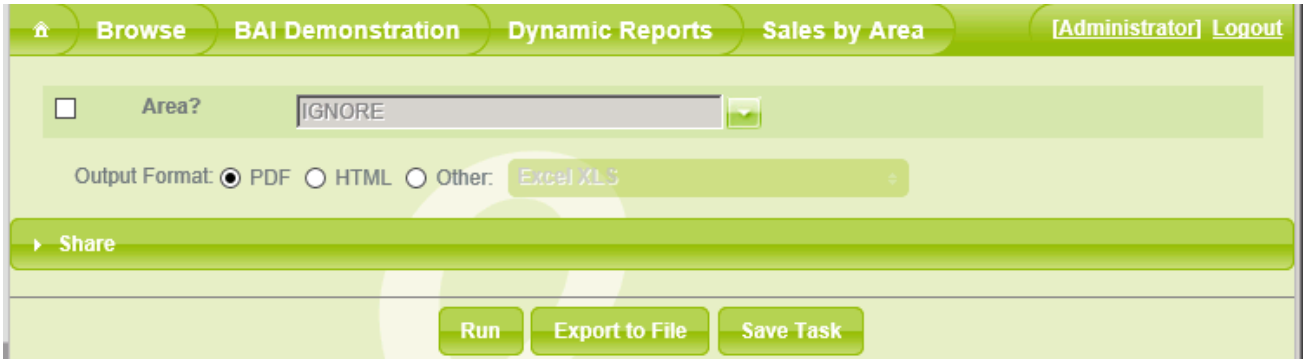
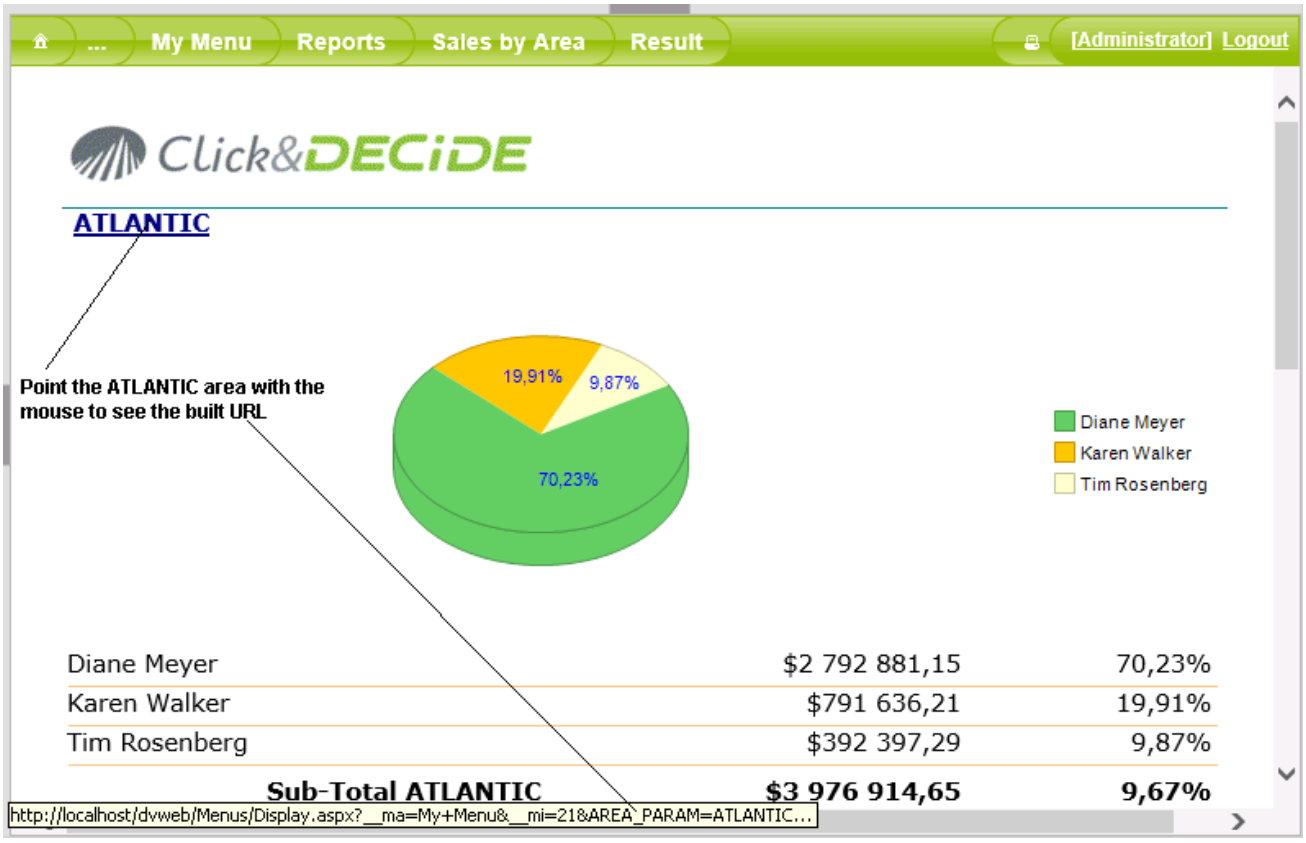


42. Click the **Sales by Area** dynamic report in the right pane.



43. Select several Areas or leave IGNORE.
44. Select PDF or HTML output format (but remember that the URL built contains __f=PDF)
45. Click **Run** to run the report.
46. Place the mouse in the Area field to display the URL as follows.



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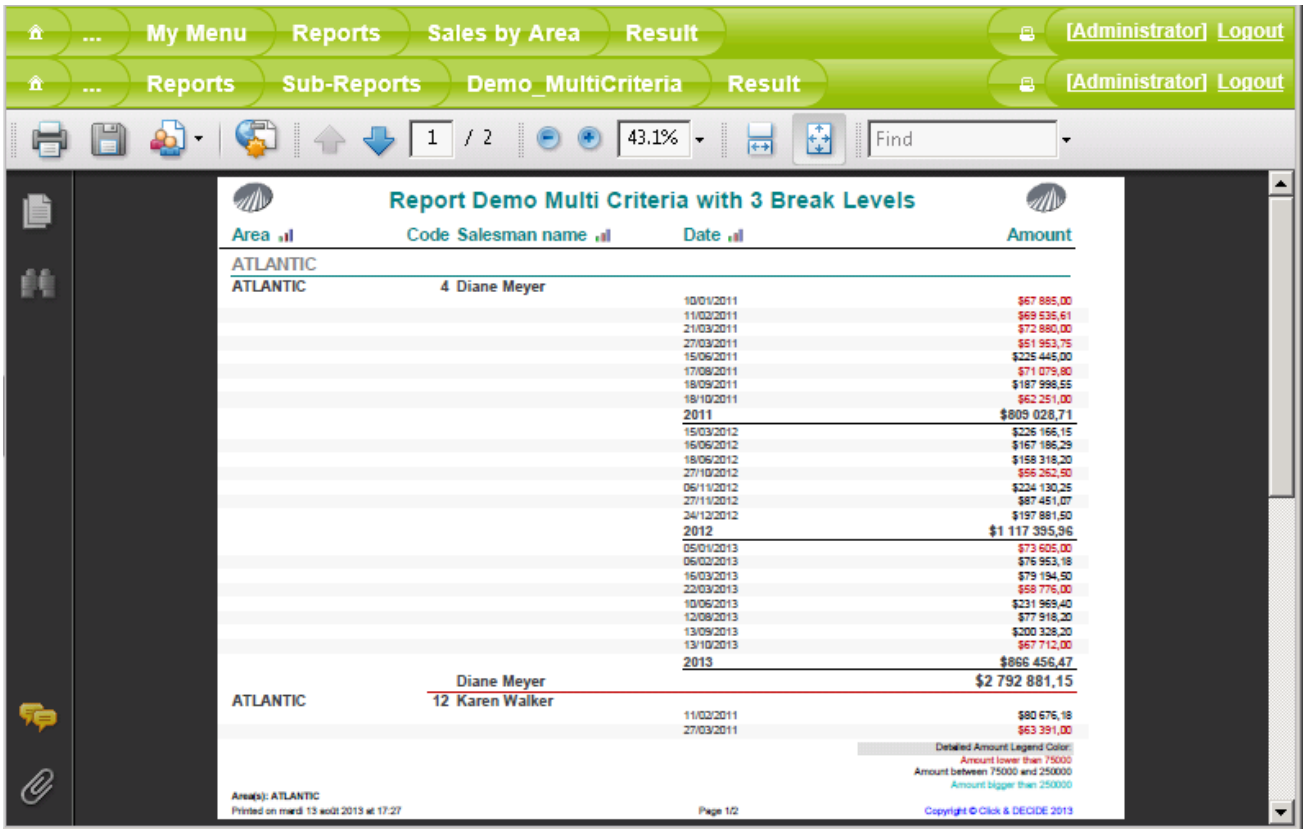
47. Click on **ATLANTIC** for example. The Demo Multicriteria report will appear for the **ATLANTIC** area:



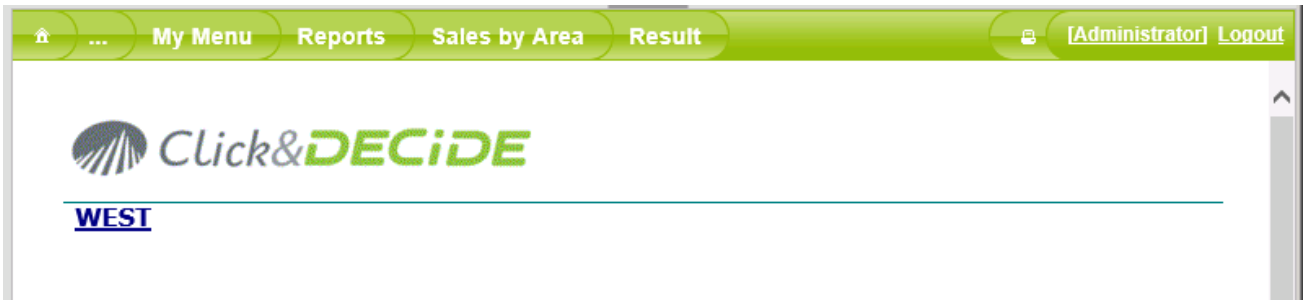
Note that the new report was generated in a new frame with a new Menu Bar, so you can either click the **Result Tab** to see again the **Sales by Area** result, or the Demo_Multicriteria Tab to come back to the called report. To avoid to offer this second Menu Bar, replace in the URL link **Display.aspx** with **Display.ashx**

'/dvweb/Menus/Display.ashx?__ma=My+Menu&__mi=21&AREA_PARAM='+AREA+'&__f=PDF&__e=1'

Display.aspx will generate the item with a new Menu Bar

Display.ashx will generate the item without a new Menu Bar (hidden)

The result will be as follow, example with WEST area: the first report will be as follow:



And when clicking the **WEST** area, the second report will appear without any new menu bar:

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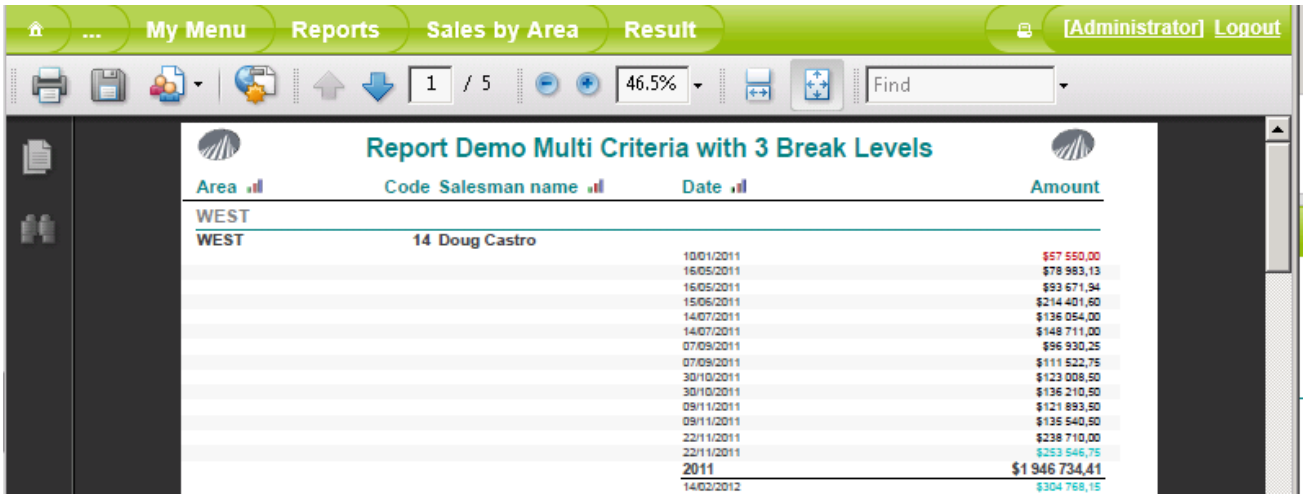


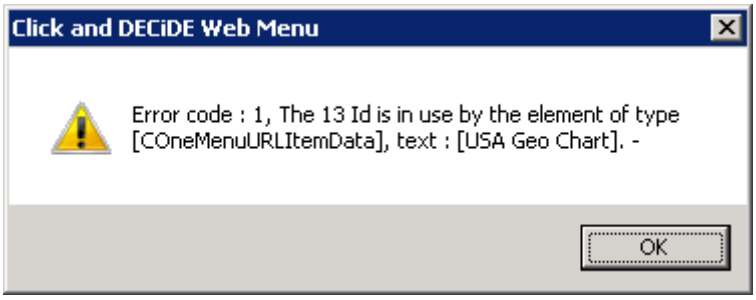
You can come back to the Sales by Area result by clicking the **Result Tab** or the **Browser Back button**.

You can come back to the Sales by Area report by clicking the Sales by Area Tab (and select any other criteria or output format).

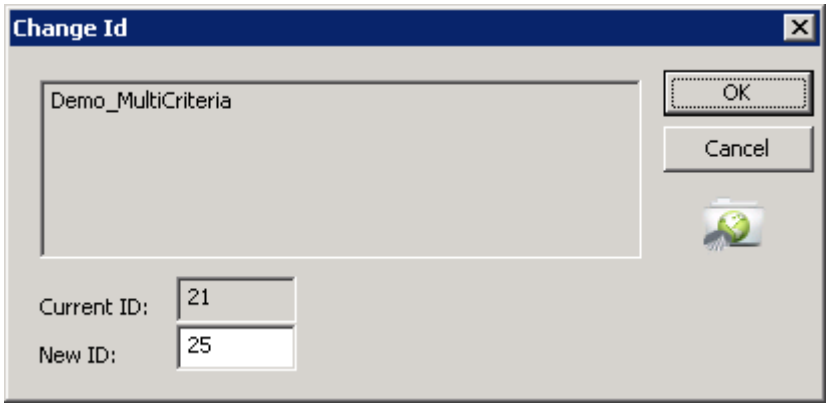
7.6.4. Change Item IDs

To change Item IDs, please follow the steps below.

1. Select the item whose ID you want to modify.
2. Select **Edit> Special>Change Item ID** if you wish to modify the Id for this item.
   The new ID number must be a number that is not already used by another item, otherwise an error message will inform you that this number is already used.



3. Enter a valid new ID in the **New ID** box.



4. Click **OK**.

7.6.5. Checking Menu Integrity

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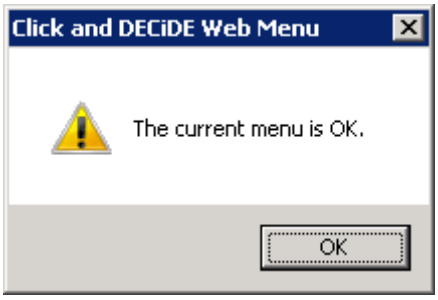
To check a menu's integrity, please follow the steps below.

1. Select **Edit> Special>Check menu integrity**.
2. Note the success message appears if no problems are found.



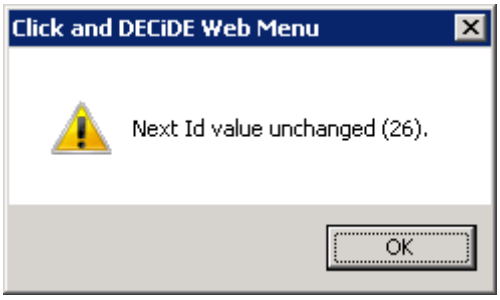
3. Click **OK**.

7.6.6. Minimizing the Next ID Value

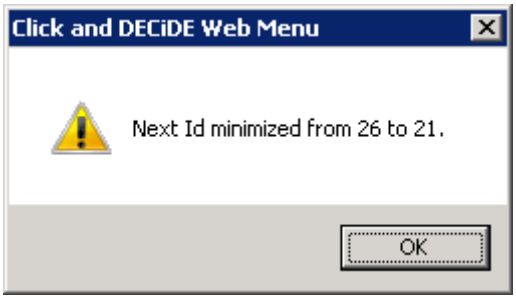
Each time you delete an item in a Menu or a Branch, the ID used is lost. If the highest menu Id was 32 and you remove the items with the ID numbers 29 to 32, the next time you add a new item, the ID number will be 33 because 32 was the last used.

To minimize the next ID value, please follow the steps below.

1. Remove the item ID you want, in this example 33.
2. Select **Edit> Special>Minimize Next Id Value** if you wish to reset the next ID value to the lowest possible.
3. Note the confirmation for the next ID value (this will be the first available number not already used).



Or, if you have removed the branch having the ID = 25, then the message could be:



If there is no item using the IDs 22 to 25.

4. Click **OK**.

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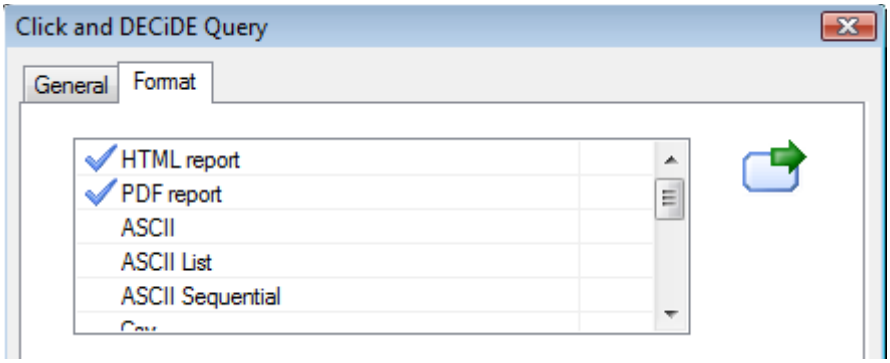
7.7. Defining Web Menu Output Formats

Each time you create a branch running a Click&DECiDE item (Query, Report or Cube), you can specify the authorized output formats. For example, if you want a report to only be exported to PDF format, or a Cube to only be exported to HTML format or to Excel 2007 Pivot Table, or a query to be exported to several formats, such as PDF, HTML and Excel and so on.

To define Web Menu output formats, please follow the steps below.

1. Click the **Item Properties** icon to define the item properties property sheet, for example, the **Click and DECiDE Query** property sheet.
2. Select the **Format** tab to specify the authorized output formats.



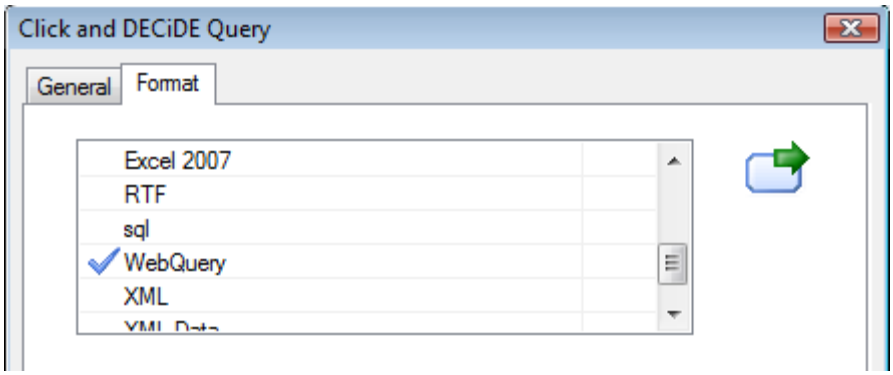
Note: the output format list is the one that was installed with the Click&DECiDE Builder on the Server machine, and if the list has been customized, the modified formats or new available output formats will appear in this list.

3. Click **OK**.
4. Select **File> Save**.

7.7.1. Working with Output Formats without Options

Select **HTML** and/or **PDF** in the item properties **Format** tab if you wish the item to be exported later to these formats by the end user.

Note the special **WebQuery** output format that can be used if you wish to be able through the Web Portal to see the special icon allowing to retrieve data in an Excel sheet using the corresponding URL in the command **Data> From Web** as describe in the ClicknDECiDE_BAI_Web_Portal_User_Guide.pdf manual, page 35, chapter 4.6.



7.7.2. Working with ASCII Output Formats with Options

All output formats such as ASCII, ASCII List, ASCII Sequential, CSV, RTF and so on, accept certain options such as a template target file and a write mode: ERASE or APPEND.

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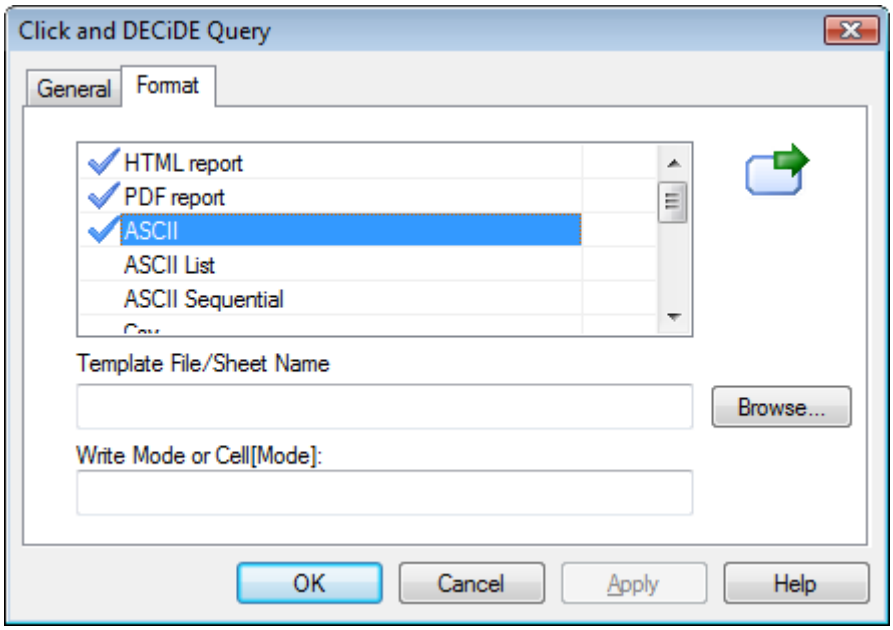
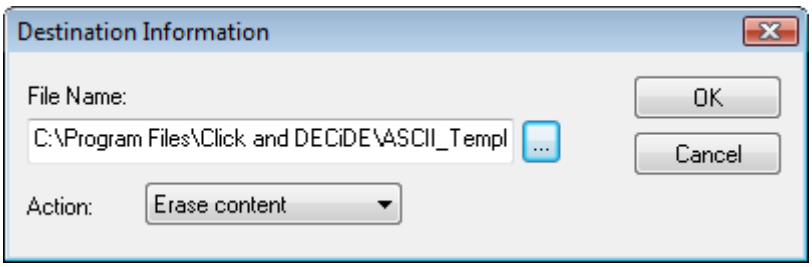
To work with ASCII output formats with options, please follow the steps below.

1. Click the item properties icon to display the item properties property sheet. For example, the **Click and DECiDE Query** property sheet.
2. Select the **ASCII** output format.



3. Click **Browse...** to locate the ASCII template on your disk.



4. Select the Write Mode, either **Erase content or Append content** from the **Action** drop-down list.
5. Click **OK**.

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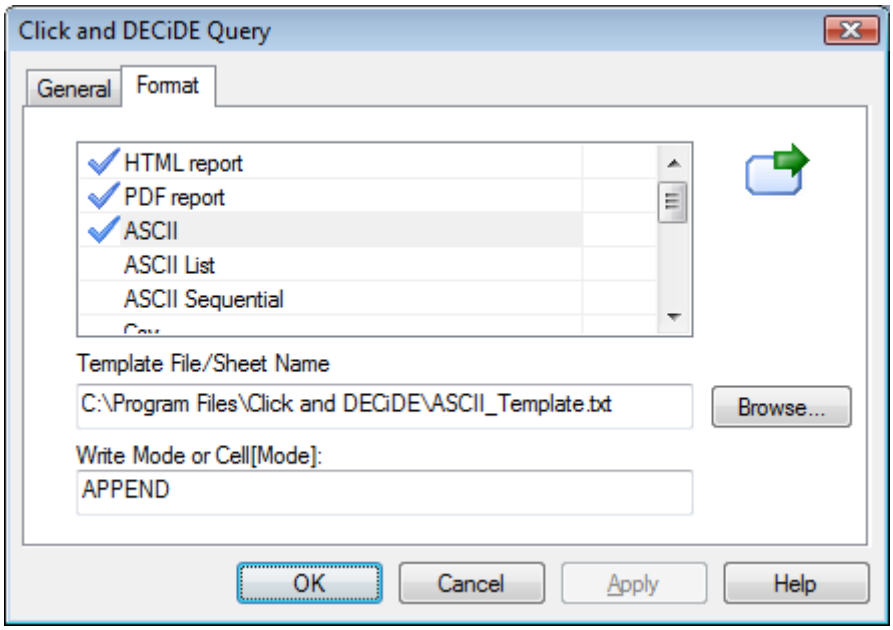


6. Select **File> Save** to save your menu to apply the changes.

Note: when the end user runs this query later and selects ASCII as the output format, the data will be sent using a copy of the template file and using the specified write mode. If the template file contains, for example a row with all header column names, the **Append content Action** option must be used, because the **Erase content** mode will generate a new ASCII file without the header row.

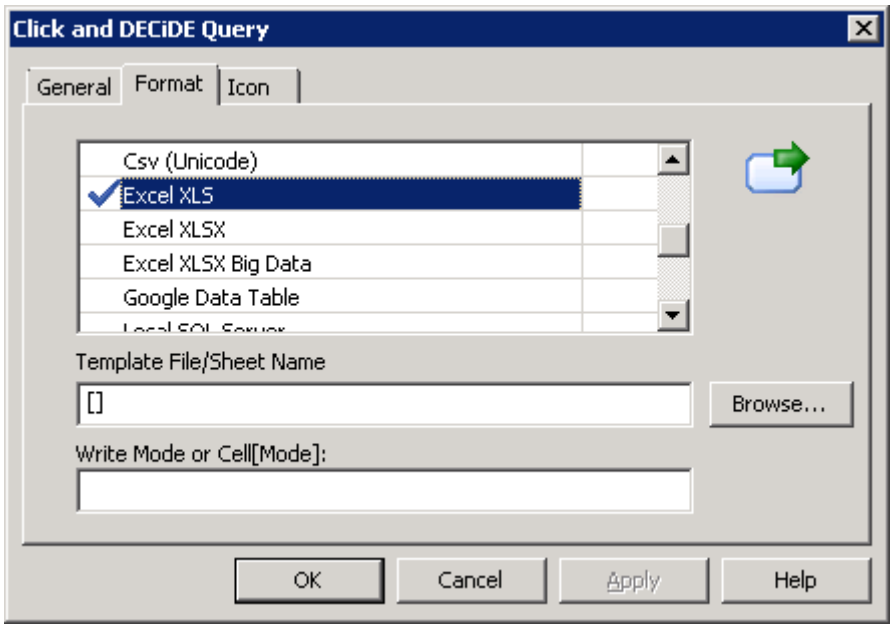
7.7.3. Working with Excel Output Formats with Options

The Excel and Excel 2007 output formats accept certain options such as a template file name, a Sheet name, the destination cell and the write mode as follows.

7.7.3.1. Excel XLS

To work with an Excel XLS (Excel 95 to Excel 2003) output format with options, please follow the steps below.

1. Select the **Excel XLS** output format for this query.



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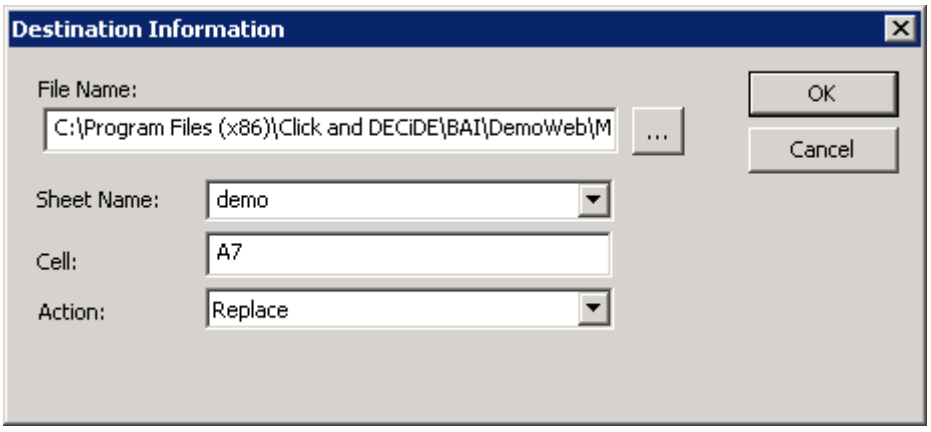
2. Click **Browse** to locate the **ModelExcel.xls** file in the C:\Program Files\Click and DECiDE\BAI\DemoWeb directory.
3. Select the demo **Sheet Name**.
4. Change the cell to **A7**.
5. Keep the **Replace** action.



6. Click **OK**. The presentation you defined will appear

Note: the syntax for the Excel and Sheet name is the following:

[C:\Program Files\Click and DECiDE\BAI\DemoWeb\ModelExcel.xls]demo

or

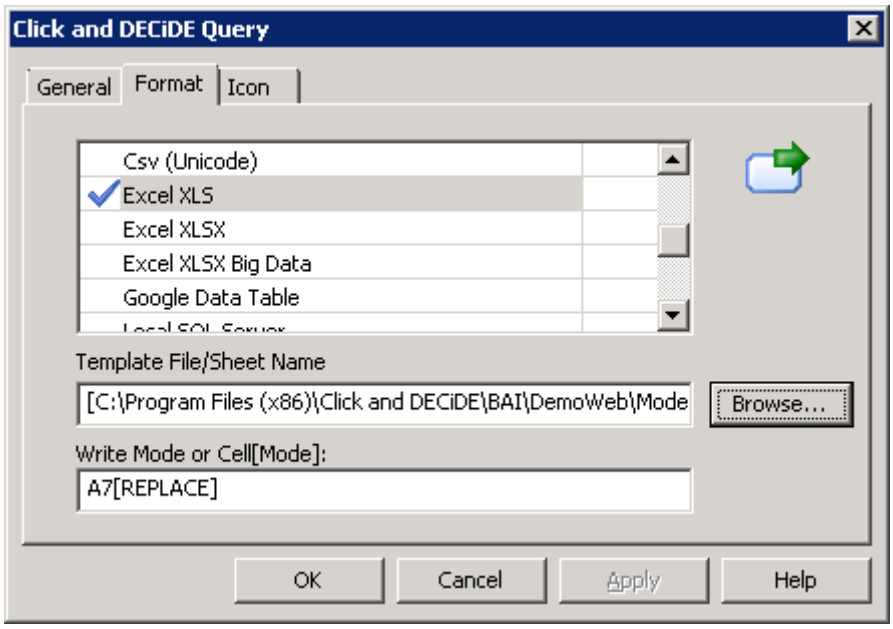
[PathName\FileName.xls]SheetName

And the destination cell and write mode are written as follows.

A7[REPLACE]

or

Cell[WriteMode]



7. Click **OK**.

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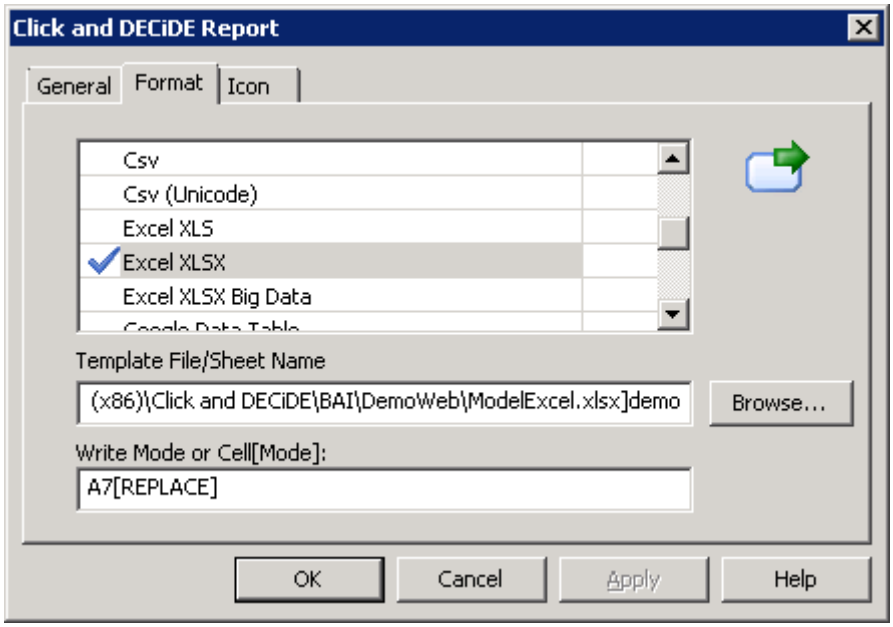
8. Select **File> Save** to save the menu to apply the changes.

Note: when the end user runs this query later and selects Excel as the output format, the data will be sent using a copy of the Excel template loaded in memory and using the specified Sheet Name, Cell and write mode.

7.7.3.2. Excel XLSX

The same can be performed with **Excel XLSX** (Excel 2007, Excel 2010 or greater). Repeat the steps described for Excel in the section directly above. Select the ModelExcel.xlsx file instead of the ModelExcel.xls.



Note: the syntax for the Excel XLSX and Sheet name is as follows.

[C:\Program Files\Click and DECiDE\BAI\DemoWeb\ModelExcel.xlsx]demo

or

[PathName\FileName.xlsx]SheetName

Note: when the end user runs this query later, selecting Excel XLSX as the output format, the data will be sent using a copy of the Excel XLSX template loaded in memory and using the specified Sheet Name, Cell and write mode.

7.7.4. Excel 2007 Pivot Table, Excel 2007 Roambi

This output format is specific for a Cube item and will apply to a Cube Tab.

This new feature; since version 10.1, allows you to send data and presentation from a dynamic cube in the Web Portal to Excel 2007 or Excel 2010 or greater. (*.XLSX format).

Since version 12, this new feature allows you to send data from a dynamic cube in the Web Portal tp Excel 2007 Roambi format (Excel 2007, Excel 2010 or greater, *.XLSX format) in a special format used by the Roambi Application running on Smartphones.

Since version 2013, the Cubes Data Tabs can also be exported to many other formats (without the Chart Tabs).

That is why, now, all available formats appear in the Menu Builder:

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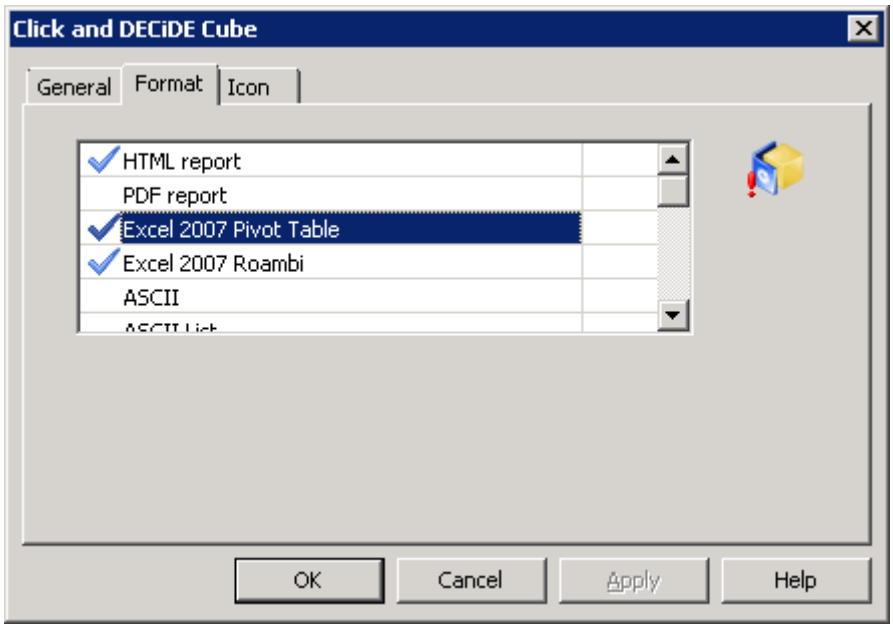
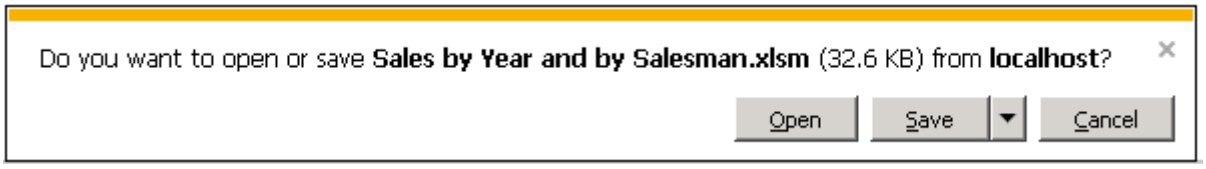


Once the menu is saved and the menu list refreshed through the Web Portal, select this output format to send the cube tab into an Excel XLSX file having the XLSM extension, as in the following example:

Click **Run**



Open the file under Excel 2007, 2010 or greater.

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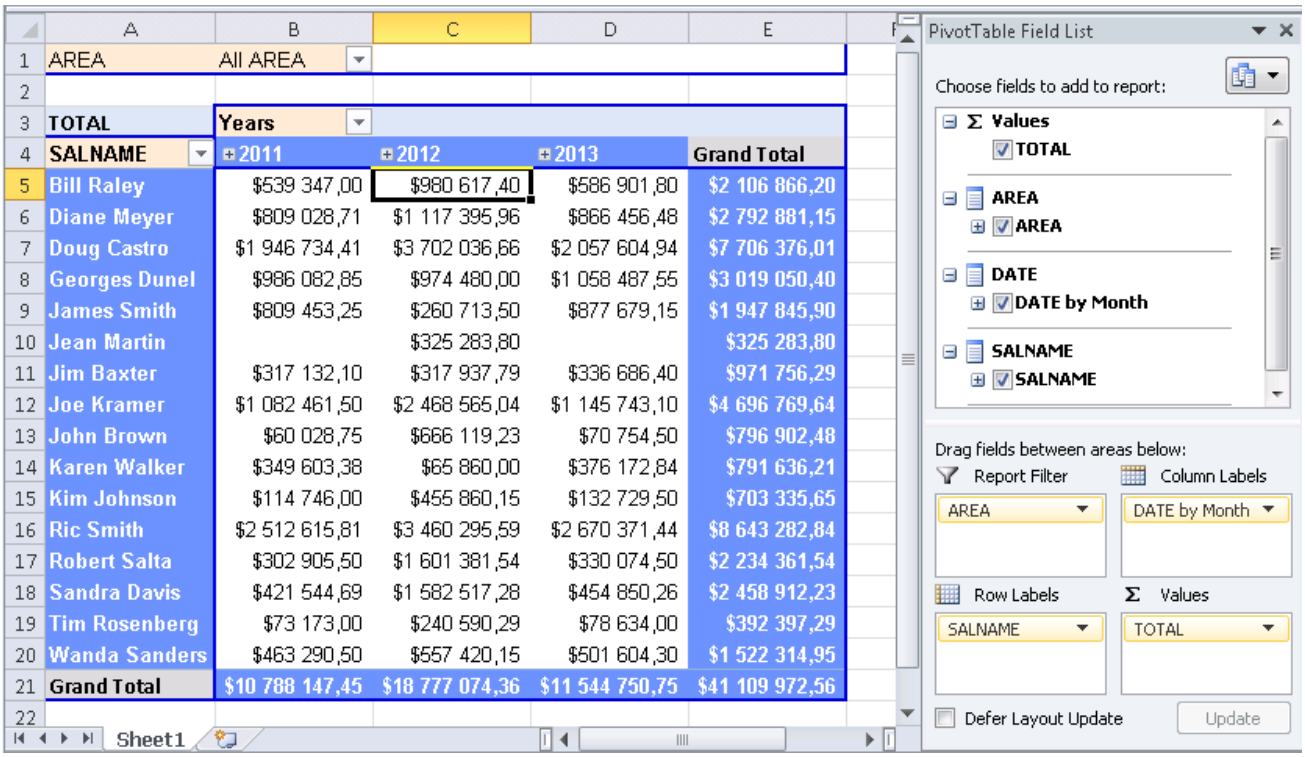

	A	B	C	D	E
1	AREA	All AREA			
2					
3	TOTAL	Years			
4	SALNAME	2011	2012	2013	Grand Total
5	Bill Raley	$539 347,00	$980 617,40	$586 901,80	$2 106 866,20
6	Diane Meyer	$809 028,71	$1 117 395,96	$866 456,48	$2 792 881,15
7	Doug Castro	$1 946 734,41	$3 702 036,66	$2 057 604,94	$7 706 376,01
8	Georges Dunel	$986 082,85	$974 480,00	$1 058 487,55	$3 019 050,40
9	James Smith	$809 453,25	$260 713,50	$877 679,15	$1 947 845,90
10	Jean Martin		$325 283,80		$325 283,80
11	Jim Baxter	$317 132,10	$317 937,79	$336 686,40	$971 756,29
12	Joe Kramer	$1 082 461,50	$2 468 565,04	$1 145 743,10	$4 696 769,64
13	John Brown	$60 028,75	$666 119,23	$70 754,50	$796 902,48
14	Karen Walker	$349 603,38	$65 860,00	$376 172,84	$791 636,21
15	Kim Johnson	$114 746,00	$455 860,15	$132 729,50	$703 335,65
16	Ric Smith	$2 512 615,81	$3 460 295,59	$2 670 371,44	$8 643 282,84
17	Robert Salta	$302 905,50	$1 601 381,54	$330 074,50	$2 234 361,54
18	Sandra Davis	$421 544,69	$1 582 517,28	$454 850,26	$2 458 912,23
19	Tim Rosenberg	$73 173,00	$240 590,29	$78 634,00	$392 397,29
20	Wanda Sanders	$463 290,50	$557 420,15	$501 604,30	$1 522 314,95
21	Grand Total	$10 788 147,45	$18 777 074,36	$11 544 750,75	$41 109 972,56
22					

For Excel 2007 Roambi format, the options are the following:

And the Excel file will look like this example, with 2 Header Rows:

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	A	B	C	D	E	F	G	H	I	J
1		TOTAL	Total			TOTAL 2011				TOTAL 2012
2	SALNAME	Grand Total	2011	2012	2013	1	2	3	4	1
3	Bill Raley	2106866,20	539347,00	980617,40	586901,80	163821,00	263351,00	0,00	112175,00	0,00
4	Diane Meyer	2792881,15	809028,71	1117395,96	866456,48	262254,36	225445,00	259078,35	62251,00	226166,15
5	Doug Castro	10999151,24	3348073,00	4116104,85	3534973,39	949237,16	93671,94	666665,49	1638498,41	3284252,75
6	Georges Dunel	3019050,40	986082,85	974480,00	1058487,55	345211,20	165210,75	319087,90	156573,00	245321,79
7	James Smith	1947845,90	809453,25	260713,50	877679,15	192406,00	179701,00	437346,25	0,00	0,00
8	Jean Martin	325283,80	0,00	325283,80	0,00	0,00	0,00	0,00	0,00	0,00
9	Jim Baxter	971756,29	317132,10	317937,79	336686,40	149539,80	0,00	167592,30	0,00	262982,79
10	Joe Kramer	4696769,64	1082461,50	2468565,04	1145743,10	137406,00	0,00	559001,00	386054,50	2081923,04
11	John Brown	796902,48	60028,75	666119,23	70754,50	0,00	0,00	60028,75	0,00	666119,23
12	Karen Walker	791636,21	349603,38	65860,00	376172,84	144067,18	0,00	205536,20	0,00	0,00
13	Kim Johnson	703335,65	114746,00	455860,15	132729,50	35610,50	0,00	0,00	79135,50	247934,15
14	Ric Smith	5350507,61	1111277,23	3046227,40	1193002,99	415267,25	293384,73	402625,25	0,00	1461895,79
15	Robert Salta	2234361,54	302905,50	1601381,54	330074,50	302905,50	0,00	0,00	0,00	962678,69
16	Sandra Davis	2458912,23	421544,69	1582517,28	454850,26	0,00	0,00	137271,19	284273,50	1170657,33
17	Tim Rosenberg	392397,29	73173,00	240590,29	78634,00	0,00	0,00	0,00	73173,00	240590,29
18	Wanda Sanders	1522314,95	463290,50	557420,15	501604,30	0,00	201401,50	261889,00	0,00	208749,15
19	Grand Total	41109972,56	10788147,45	18777074,36	11544750,75	3097725,95	1422165,91	3476121,68	2792133,91	11059271,13

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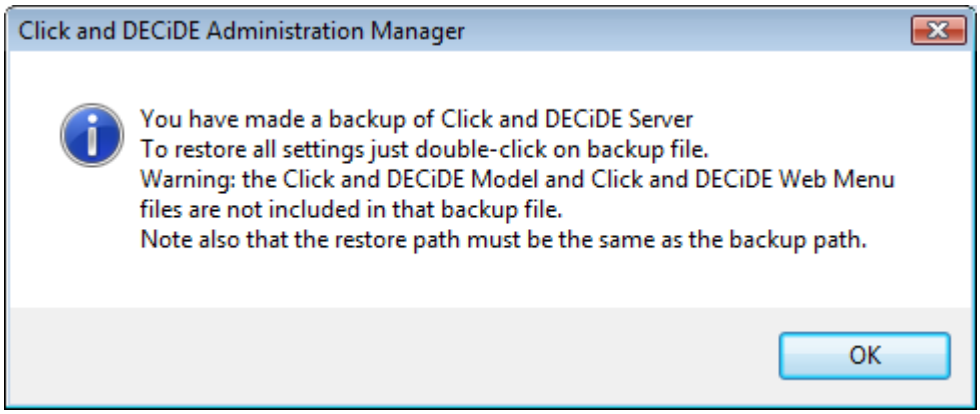
8. Other commands

8.1. Backup Database Security

Use the command File> Backup Database Security to save your entire Administration Manager configuration.

A default name such as 2010.03.17_122424.cndbck will be proposed (YYYY.MM.DD_hhmmss.cndbck)

Note that the previous extension was .bck can still be used, but since version 10.1 the extension will be .cndbck.


Click and DECiDE Administration Manager
You have made a backup of Click and DECiDE Server
To restore all settings just double-click on backup file.
Warning: the Click and DECiDE Model and Click and DECiDE Web Menu files are not included in that backup file.
Note also that the restore path must be the same as the backup path.
OK

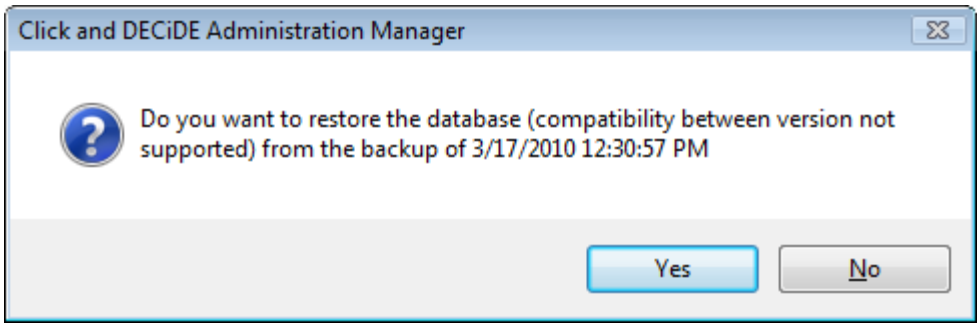
This backup file will contain all the data sources defined, all the Users and User Groups defined, all the Menu Names defined in this software and all the relation between each Tab

New since Click&DECiDE version 2012: this backup also contains now the **Scheduled Tasks** and the **Output Formats** defined in the Server machine and made with Click&DECiDE Builder.

Warning: this backup will not include the Menu files (with extension *.wmu) neither the Model files (with extension *.mod or *.mox).

8.2. Restore a Backup for Administration Manager

Close Click&DECiDE Administration Manager. Search for your backup file (with extension *.bck or *.cndbck) and double-click on this file. You will get this window. Click **Yes** to continue.


Click and DECiDE Administration Manager
Do you want to restore the database (compatibility between version not supported) from the backup of 3/17/2010 12:30:57 PM
Yes
No

That will restore the backup file and open Click&DECiDE Administration Manager.

Click now the command **File> Update Database Security** to be sure to generate again the working internal files.

8.3. Check Database Security

Click the command **File> Check Database Security** to get a windows displaying information about missing items such as User Group without users, Users Groups without Data Source Access, User not belonging to any User Group etc.

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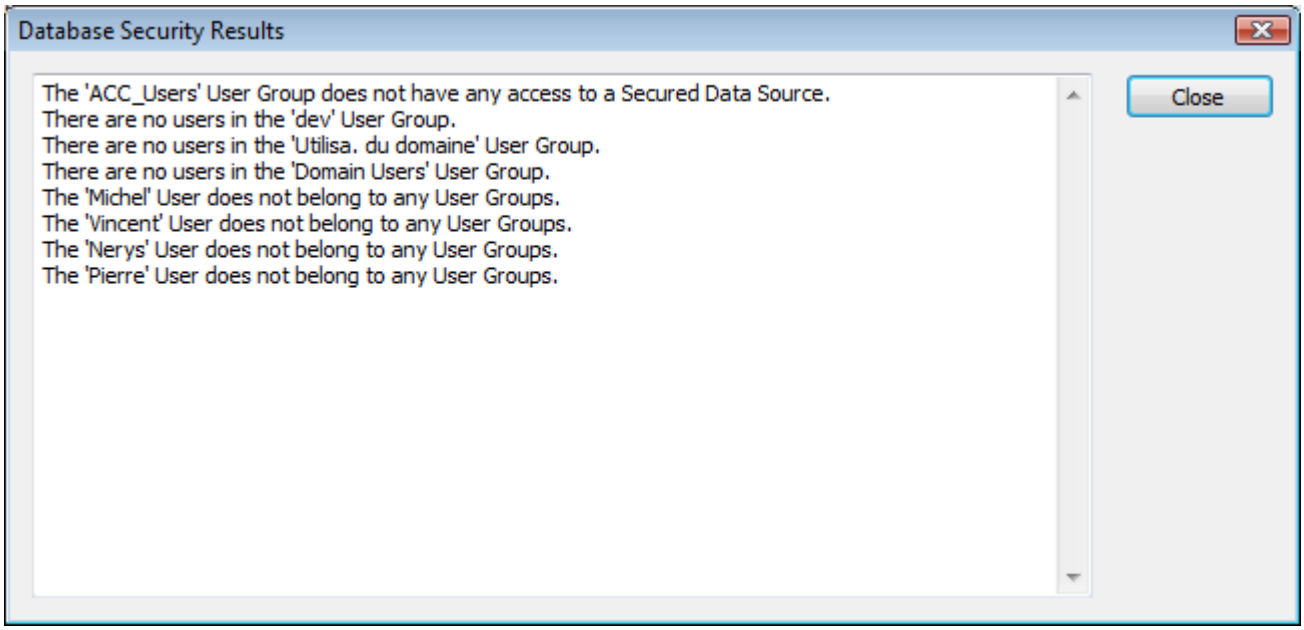
Database Security Results
The 'ACC_Users' User Group does not have any access to a Secured Data Source.
There are no users in the 'dev' User Group.
There are no users in the 'Utilisa. du domaine' User Group.
There are no users in the 'Domain Users' User Group.
The 'Michel' User does not belong to any User Groups.
The 'Vincent' User does not belong to any User Groups.
The 'Nerys' User does not belong to any User Groups.
The 'Pierre' User does not belong to any User Groups.
Close

8.4. Export Report

Click the command **File> Export Report** to get a report in RTF format about:

Data Source summary: all the data source name, their type, the Running Mode, the security, the maximum of simultaneous users, the Locked status, the direct access, the default password, etc.

User Group summary: Name, Description, Task Administrator (Supervisor), Enable status.

Users summary: Name, ID, Password (stars only will appear if exist), Address, Zip Code, City, Phone, Enable status.

User and Password summary: Data Source, ID, Password (Encrypted if exist).

User and User Group summary: list of all Users with ID and Name for each User Group.

User Group and Data Source Access summary: User Group, Data South, Path (if defined).

Problems summary: the same information given by the command **File> Check Database Security**

8.5. Import Windows Users and Groups

Click the command **File> Import Windows Users and Groups** to import directly in Click&DECiDE Administration Manager one or several Windows User Groups and Users.

You will get this window with all machines in the Domain. Select a machine to display the sub-levels Local Group and Global Groups:

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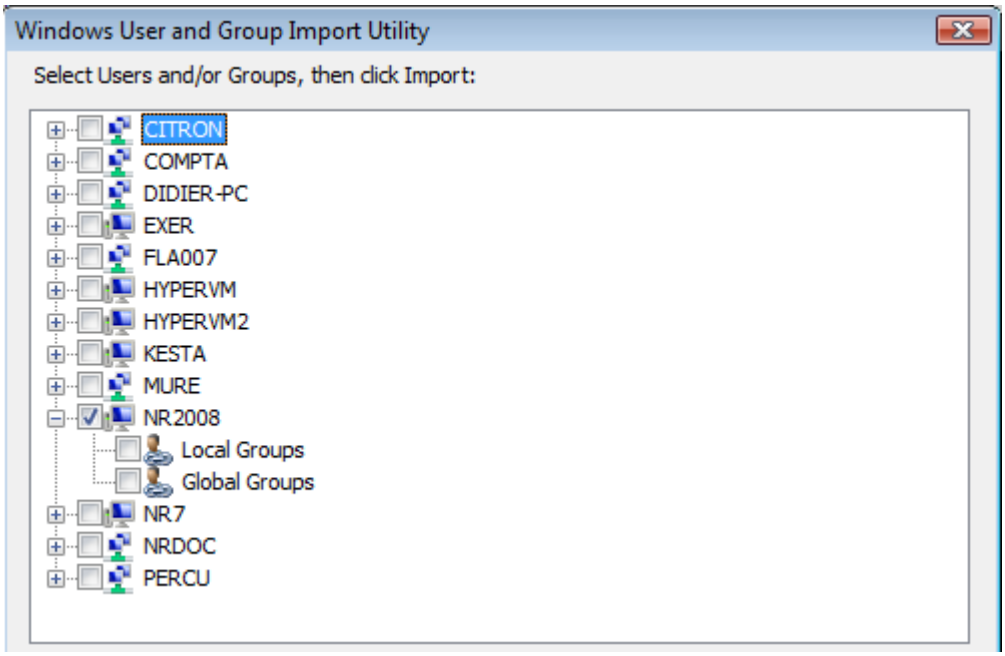
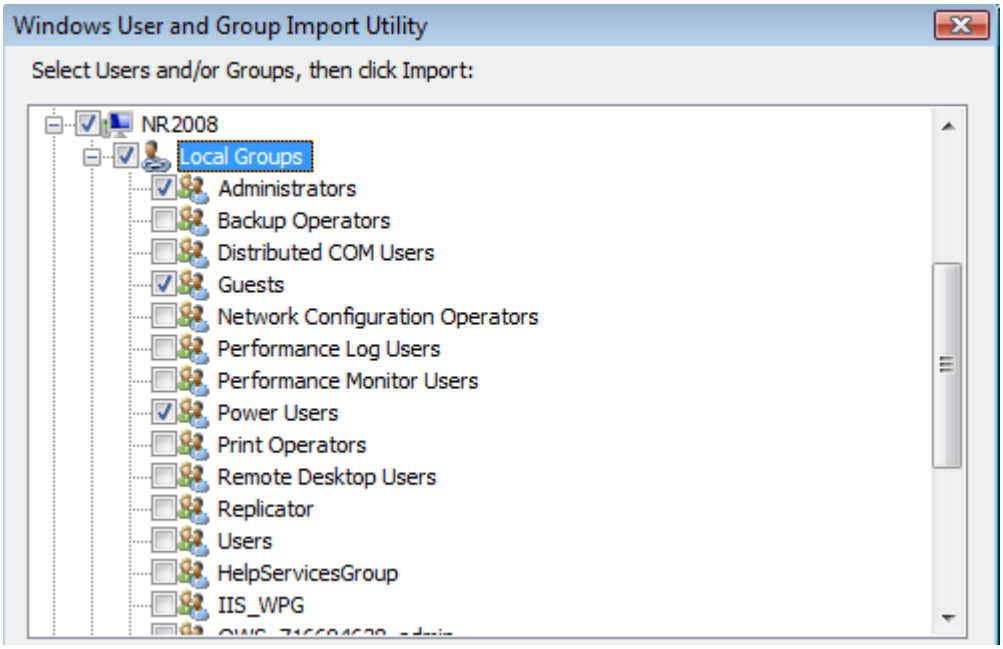


Select the required level then double click to display the sub-level content:



Select the required sub-level to display the sub-level users:

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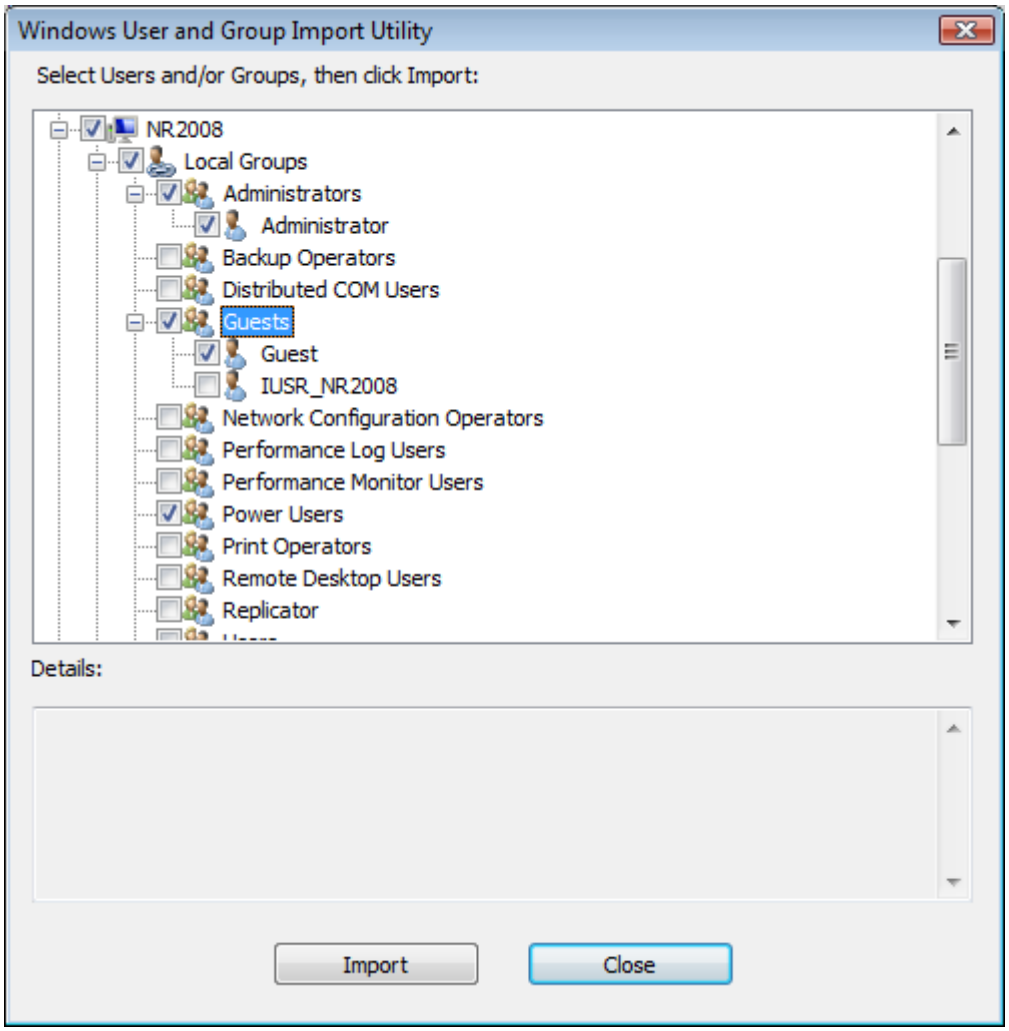
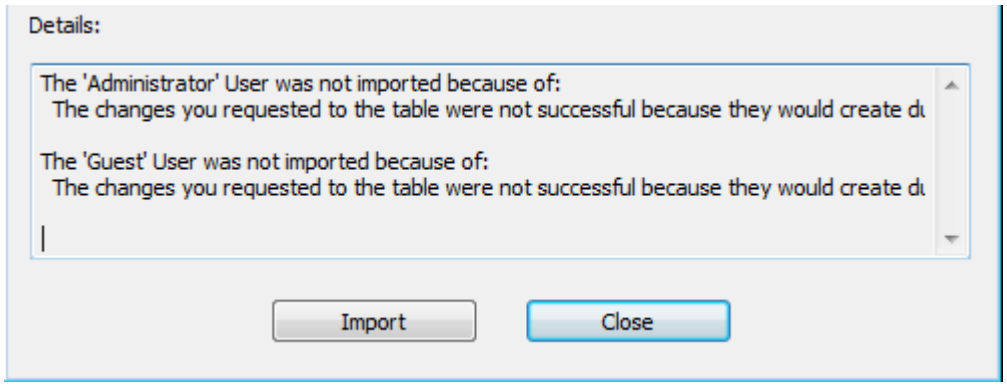


And click **Import** to retrieve the information inside Click&DECiDE Administration Manager.

The Details box can display some warning such as:


Details:
The 'Administrator' User was not imported because of:
The changes you requested to the table were not successful because they would create du
The 'Guest' User was not imported because of:
The changes you requested to the table were not successful because they would create du
Import
Close

The 'Administrator' User was not imported because of:

The changes you requested to the table were not successful because they would create duplicate values in the index, primary key, or relationship. Change the data in the field or fields that contain duplicate data, remove the index, or redefine the index to permit duplicate entries and try again.

When this step is finished, click **Close**.

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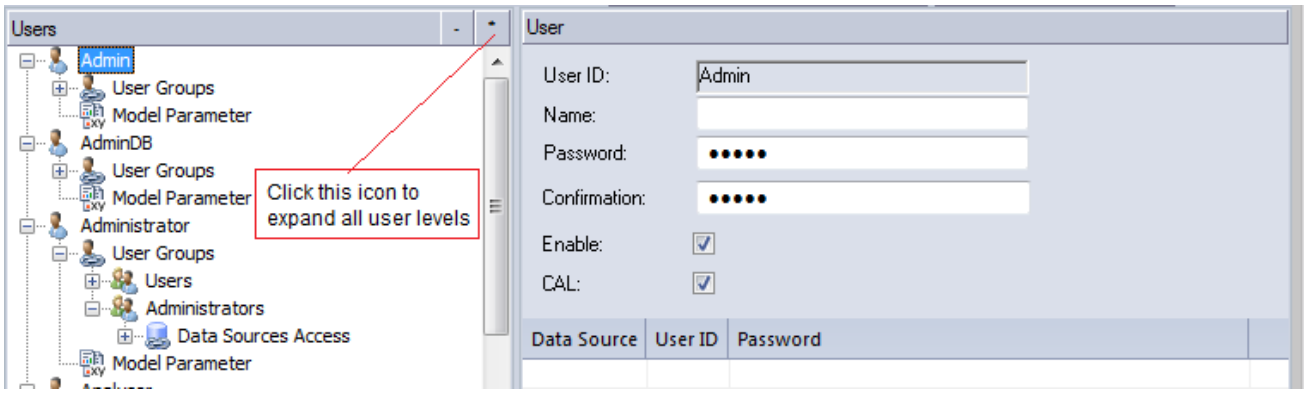
Apply then to any required User Group the data sources they can access to, the menu they will be able to see through the Web Portal, etc.

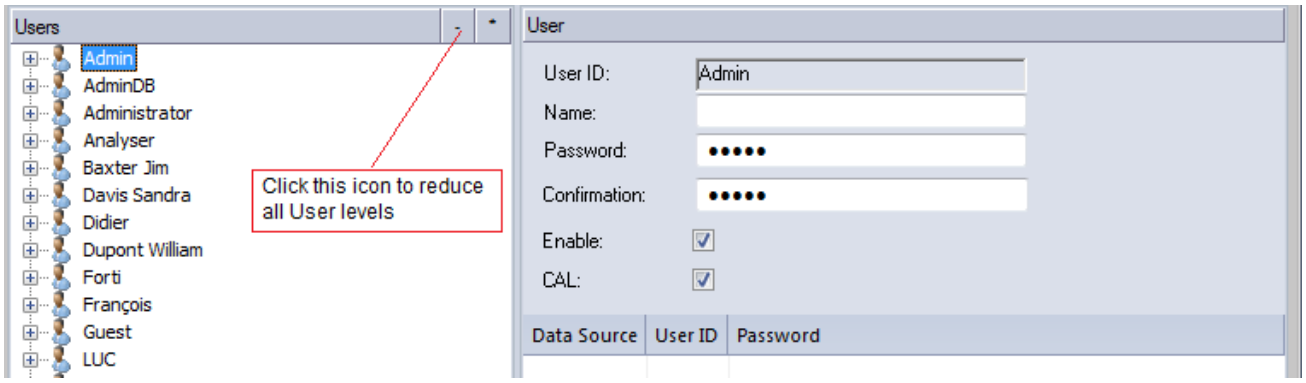
Always finish using the command **File> Update Database Security** to be sure to generate again the working internal files.

8.6. Expand or Reduce all Levels with one click

When being in the User Groups Tab or in the Users Tab, you can expand all levels using one click on the "plus" icon:



When being in the User Groups Tab or in the Users Tab, you can reduce all levels using one click on the "minus" icon:



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